ASN Tool Box– iPad Application

Release 1.0

User Manual

November 2014

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About this Document

Purpose

This manual presents the functional capabilities of the ASNToolBox Application, and contains the procedures that are needed for using ASNToolBox app.

Intended Audience

This manual is intended for agents, who intend to view, information before it is displayed on ASNToolBox (Ipad Application).

Organisation of this Document

Information in this document has been organised as follows:

Table : Organisation of the Document

Chapter	Description
Introduction	Describes application features, types of users, roles and their authorities
Getting Started	Describes generic login, logout, mail, print functionalities
Understanding the ASN ToolBox app	Describes the various modules in Home module(Common Functionalities)
Common Functionalities (Home)	Describes how manage the information about the User Agents, Corporate Feeds, Documents, Maps and Collaboration Tools, with create, update, view and search functionalities.
Sales Corner	Describes Agent can view training program schedules, can calculate savings using my savings tool for their sales activities and it also enables user to view bonus commissions which they earned because of receiving agents under them
Lead Management	Describes Agnet can create ,view update prospects locally on device and also view prospect report
Service Corner	Describes Agent can perform enquiries based on proposals, policies and agents. Can create service request for policies like change address, change premium etc.
Product Literature Management	Describes Agent can subscribe url for Product, published from admin console. Can view product details as cubbuzz or in slide mode.
Point Of Sale	Describes Agent about Allianz policies, premium and facilitate Allianz agent to generate illustrations, perform need analysis, selection of product for the lead and sumbit policies forms electronically.
Business Corner	Describes Agent with business involved on Personal,Unit and group level.Clubs, Contest, Awards are defining perks and achievements.Commission Analysis, Commission Projection, Commission Report are for individual commission gained and projected &

	Performance Analysis combined together achieve the objective.

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1. Introduction

ASN Tool Box is a stepping. This application has two parts:

1) An ipad based application which can be used by the User Agents on the tour to check their itinerary, browse through timetables, coordinate exams, input marks, play backing tracks for Rock and Pop, record candidate performances and upload them to ASN Tool Box Admin Console central server for quick processing of certificates.

2) A web based application, which receives the marks and feedback of the candidates from the Examiners' Android tablet and helps the Academic team to resolve referrals, check results randomly (quality checking), listen to candidate recordings, change marks if required and release them to ASN Tool Box Admin Console Online for further processing. Moreover it also enables ASN Tool Box Admin Console's wide Examiner community to logon and check their exam result upload status, search for candidates, listen to recordings and view marks provided by them to the candidates. ASN Tool Box Admin Console's Operations team can also logon to this application to view Examiner Itinerary and timetable download status and help examiner on the field with their tasks

This user guide provides the details and working steps and procedures for the ASN Tool Box – iPad application

1.1. Features of the ASN Tool Box– iPad Application

The following are the main features of the ASN Tool Box application which will be discussed in the sections below.

- Home (Common Functionalities)
- Sales Corner
- Service Corner
- Point Of Sale
- Product Literature Management
- Lead Management
- Business Corner

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2. Getting Started

Access to ASN Tool Box is limited to authorised users only. To gain access, a User ID and password is required.

2.1 Device Compatibility

The ASN Tool Box application supports following devices:

- ipad 2 and ipad 3

2.2 Logging On

If you are logging on to the application:

1. Tap on app icon, The ASN Tool Box login page opens.

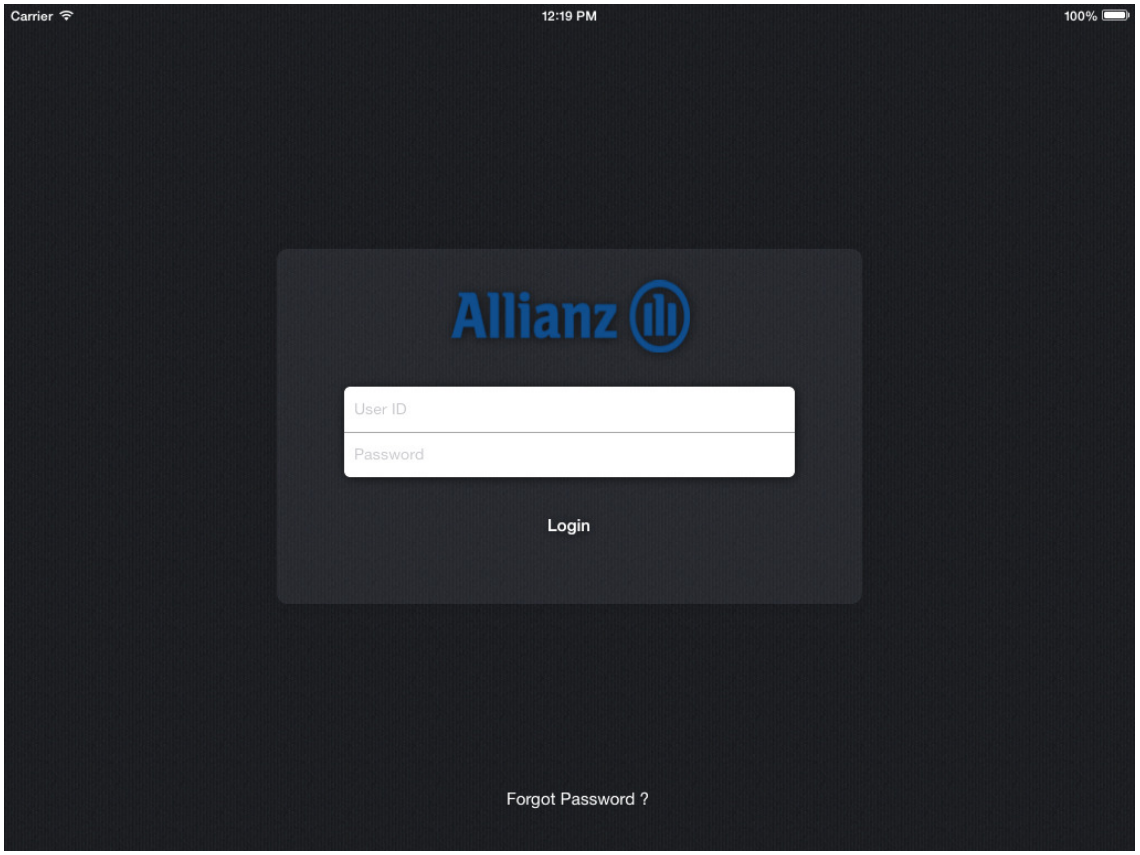

Figure 1.1: Login Page

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2. Enter your **User ID**.
3. Enter your **Password.**
4. Click on "Login" button to log on to the application.

2.3 First Time Password change

When user login for the first time in ASNToolBox app, it is required to change the default password.

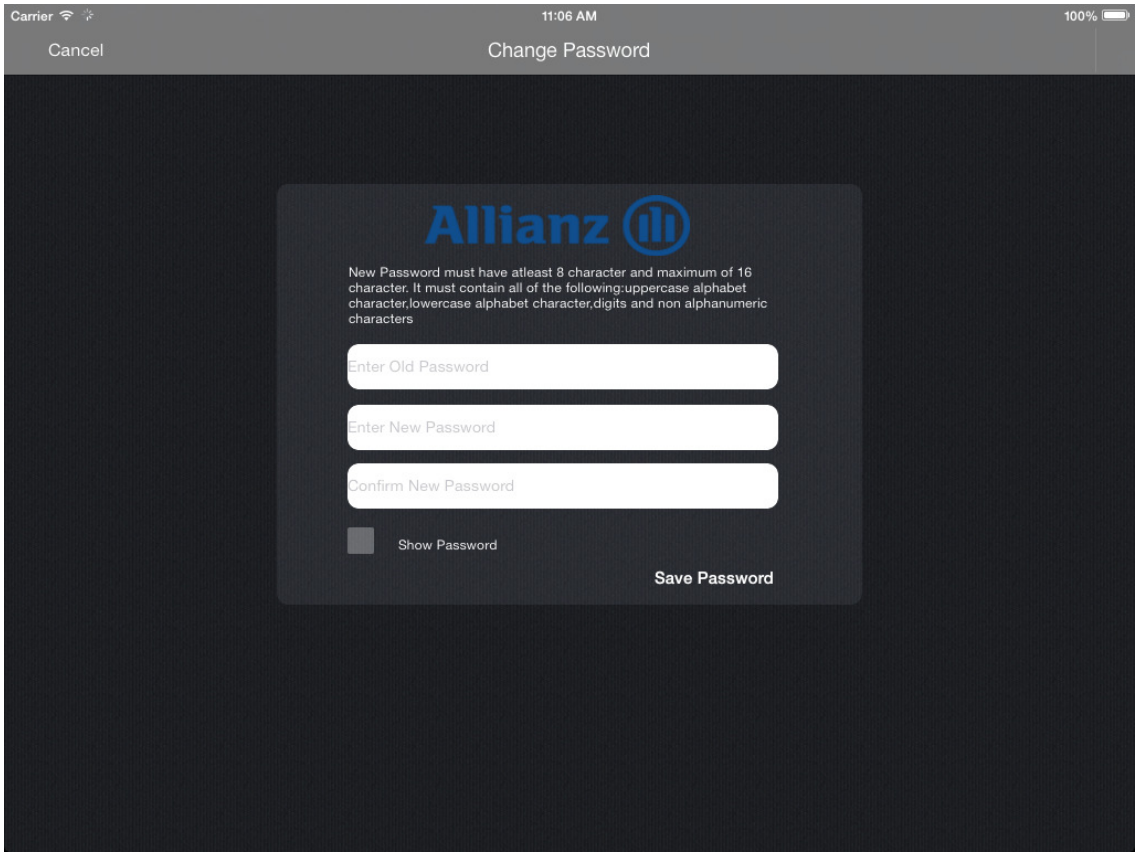
Carrier
11:06 AM
100%
Cancel
Change Password
Allianz
New Password must have atleast 8 character and maximum of 16 character. It must contain all of the following:uppercase alphabet character,lowercase alphabet character,digits and non alphanumeric characters
Enter Old Password
Enter New Password
Confirm New Password
Show Password
Save Password

Figure 1.2 : Change Password

1. Change the password.
2. After successful password change, user will be redirected to login page.
3. After login Home page appears.

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Figure 1.3: Home Page

2.4 General Functionalities

On most of the screens, Mail , Download and print functionality is provided. These functionalities take the screen shot of the page and send it through mail and printer. In case of download, that screenshot is saved into sand box of the application.

1. Mail

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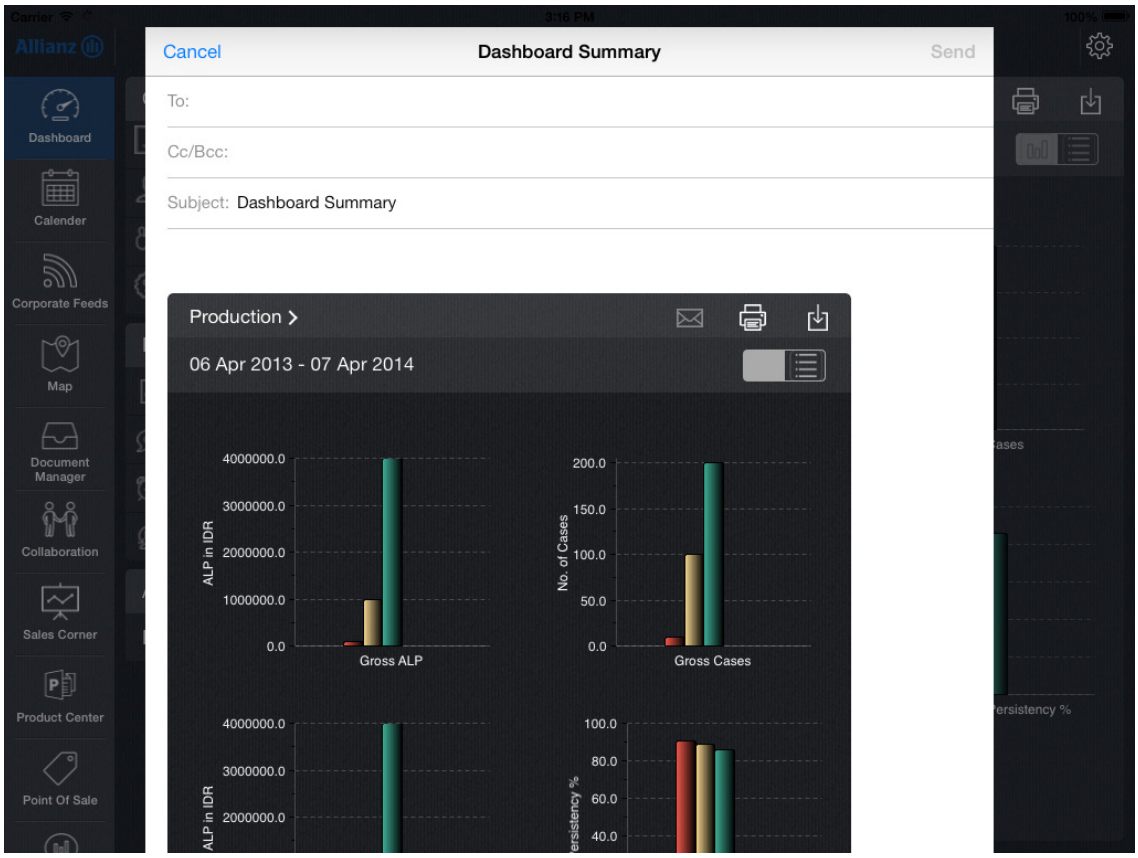

Figure 1.4: Mail screen

2. Print

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Figure 1.5 : Print

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2.5 Logout

To log out of the application, click Logout from the **settings** icon. The **Login** page appears.

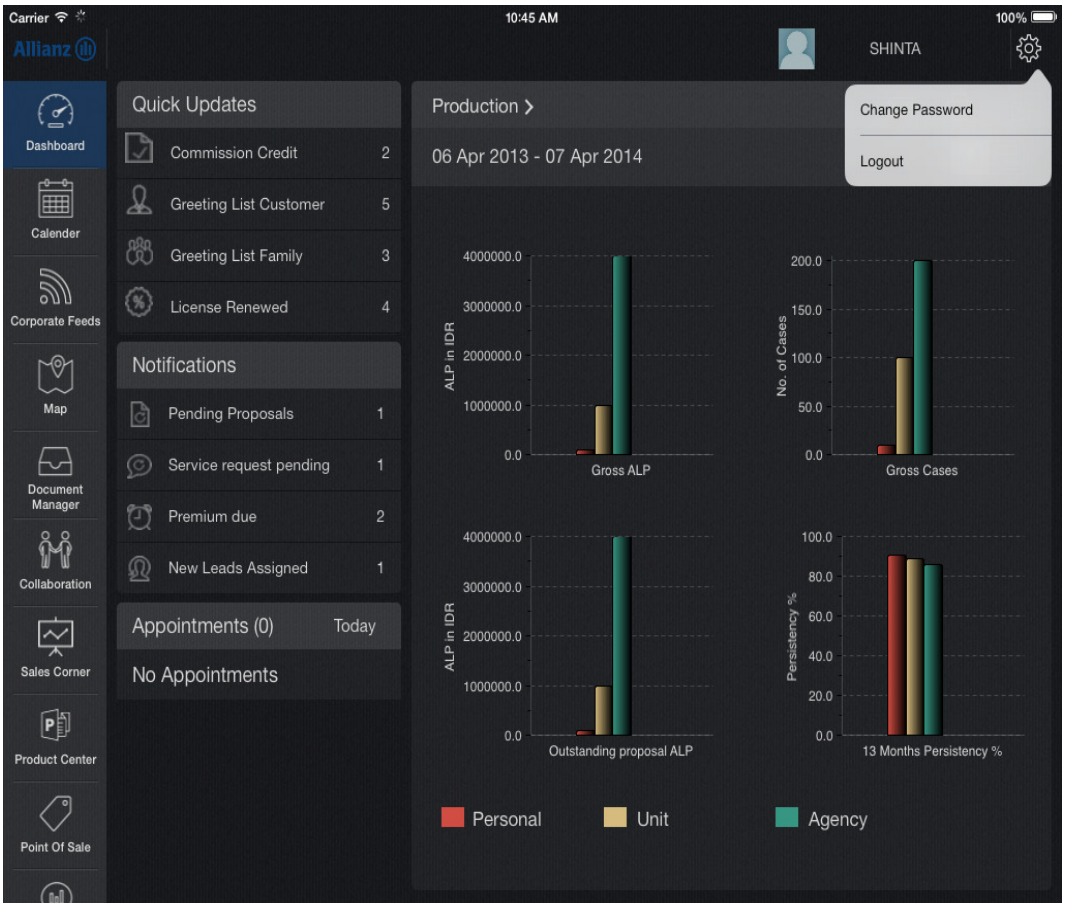

Figure1.6 : Logout

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3. Home Module (Common Functionalities)

Home Module is designed for managing common functionalities and it consists of ten sub sections as follows:

1. My Profile
2. Dashboard
3. Notifications
4. Quick Updates
5. Appointments
6. Corporate Feeds
7. Document Manager
8. Calendar
9. Map
10. Collaboration

3.1 My Profile

This functionality enables the user to update his photo and view his personal details like :

1. Agent Details
2. Personal Details
3. Residential Address
4. Agent Office Address
5. Addres for Communication
6. Contact Details
7. Bank Details
8. License Details
9. Spouse Details
10. Passport Details

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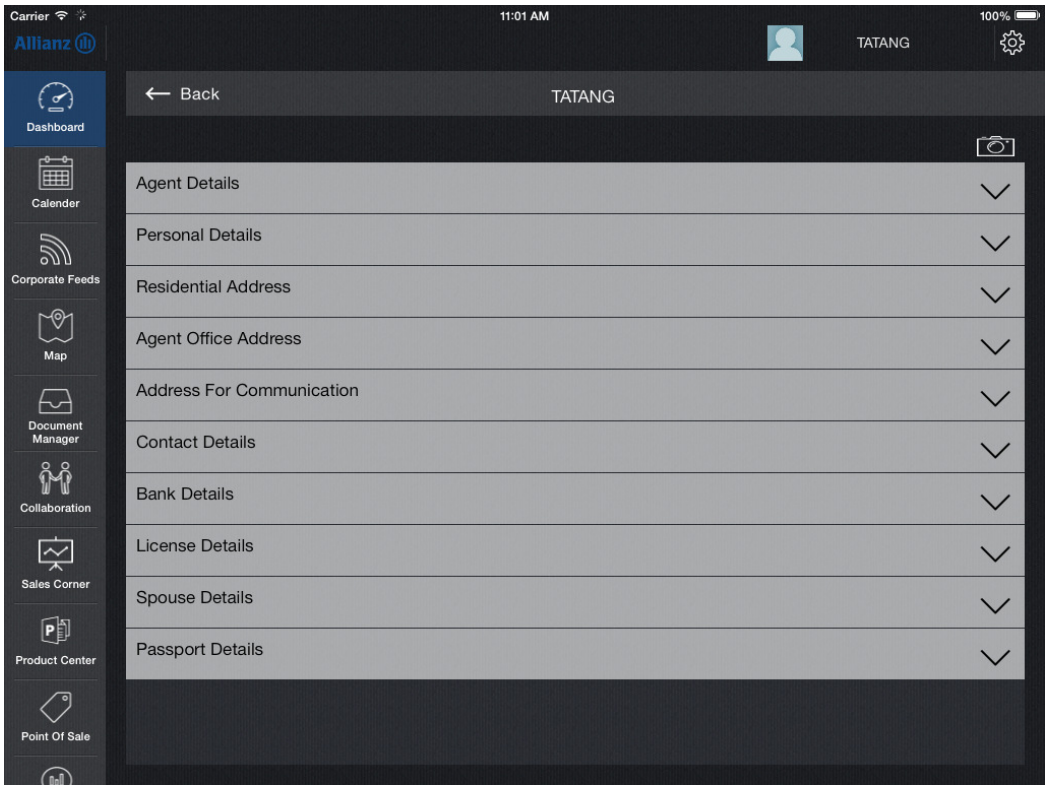

Figure1.7: My Profile Screen

3.2 Notifications

This functionality enables the agent to view Notifications

Click on any notification from the list of available notification subject, summary of all the notification under that subject appears

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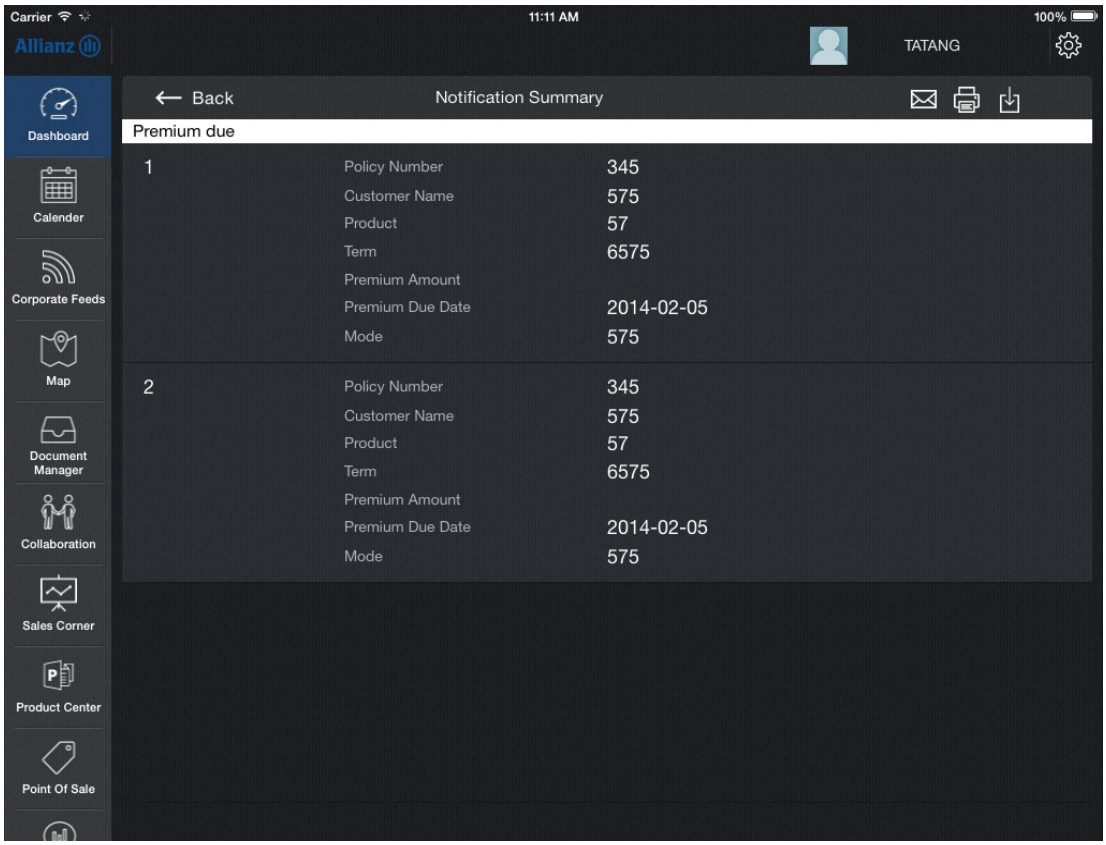

Figure1.8: Notification Summary screen

3.3 Quick Update

This functionality enables the agent to view Quick Updates

1.Click on any Quick Update from the list of available updates subject, summary of all the quick updates under that subject appears

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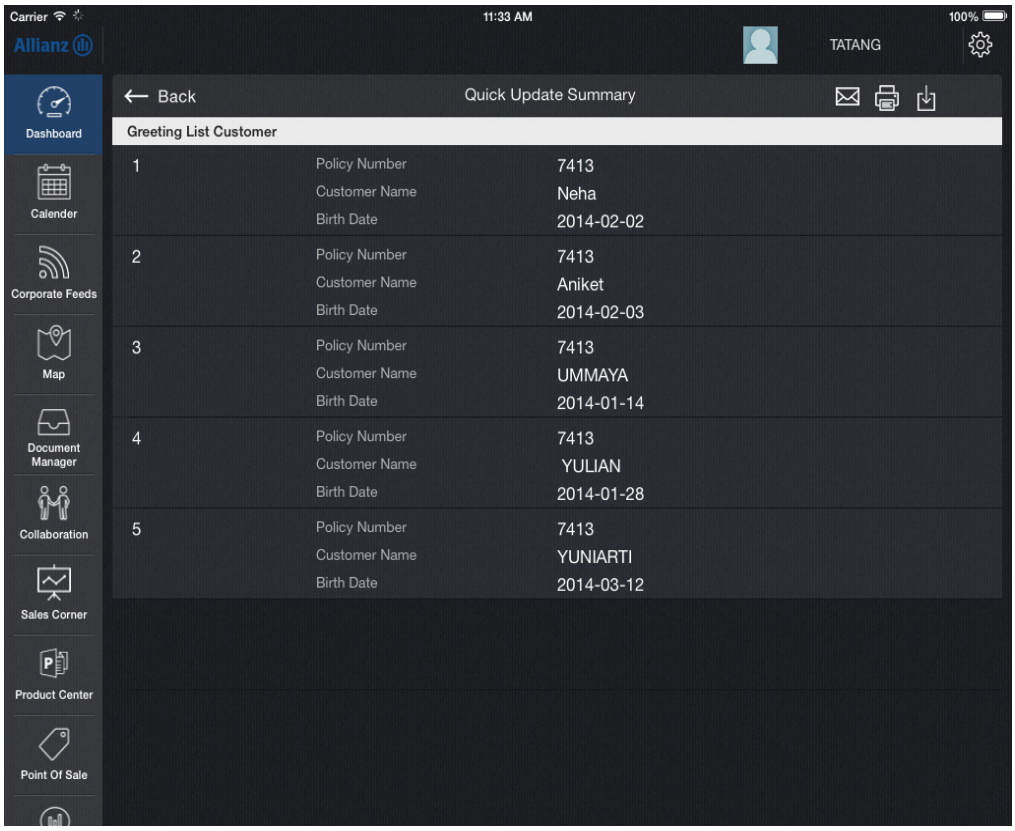

Figure 1.9:Quick Update Summary screen

3.4 Dashboard

Dashboard enables the agent to view details for **Production**, **New Business** and **Service Request**

1.Click on any item from the list of available Dashboard type, summary of that type appears

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Figure1.10:list of Dashboard type screen

2 . On selecting dashboard type from list, below screen appears based on the type selected.

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Figure1.11:Dashboard summary screen

3. Agent can see the details of the dashboard by clicking on any of the bars of the graph

4. This Dashboard is also available in table form also by clicking on

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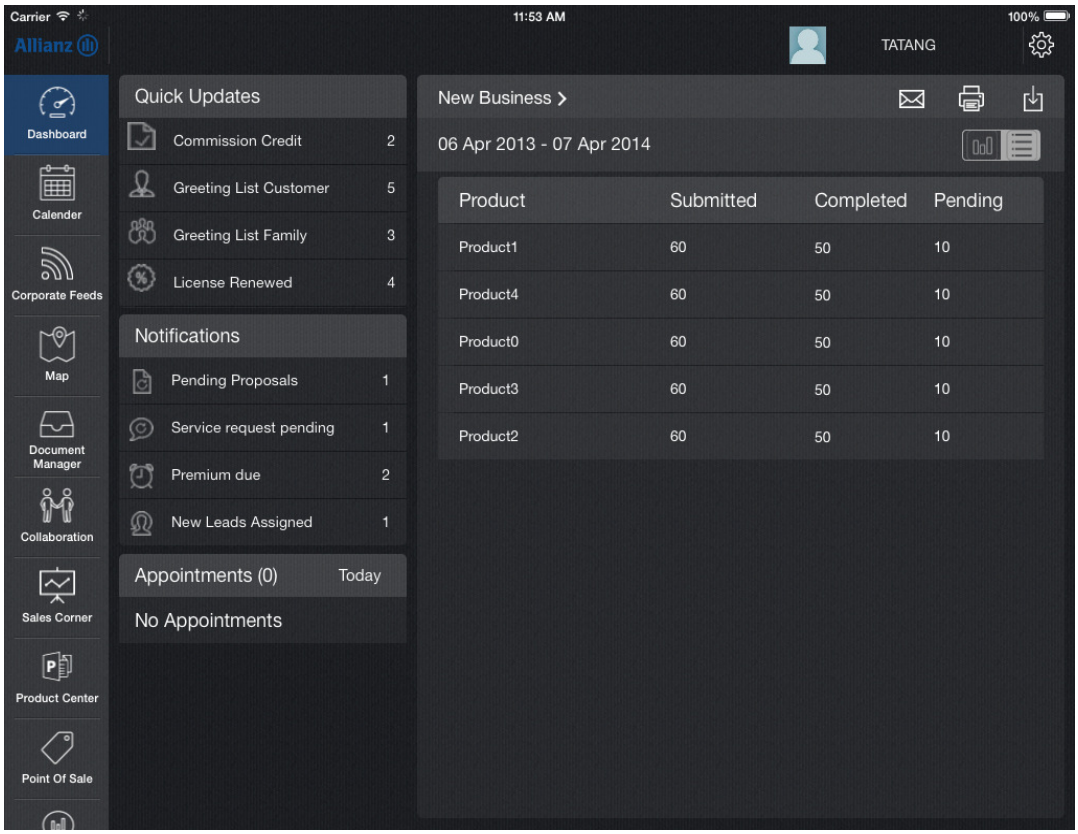

Figure1.12: Dashboard summary Table view screen

3.5 Appointments

1. When agent login for the first time there will not be any appointments on the Home page screen
2. Agent can create appointments on clicking "No Appointments"

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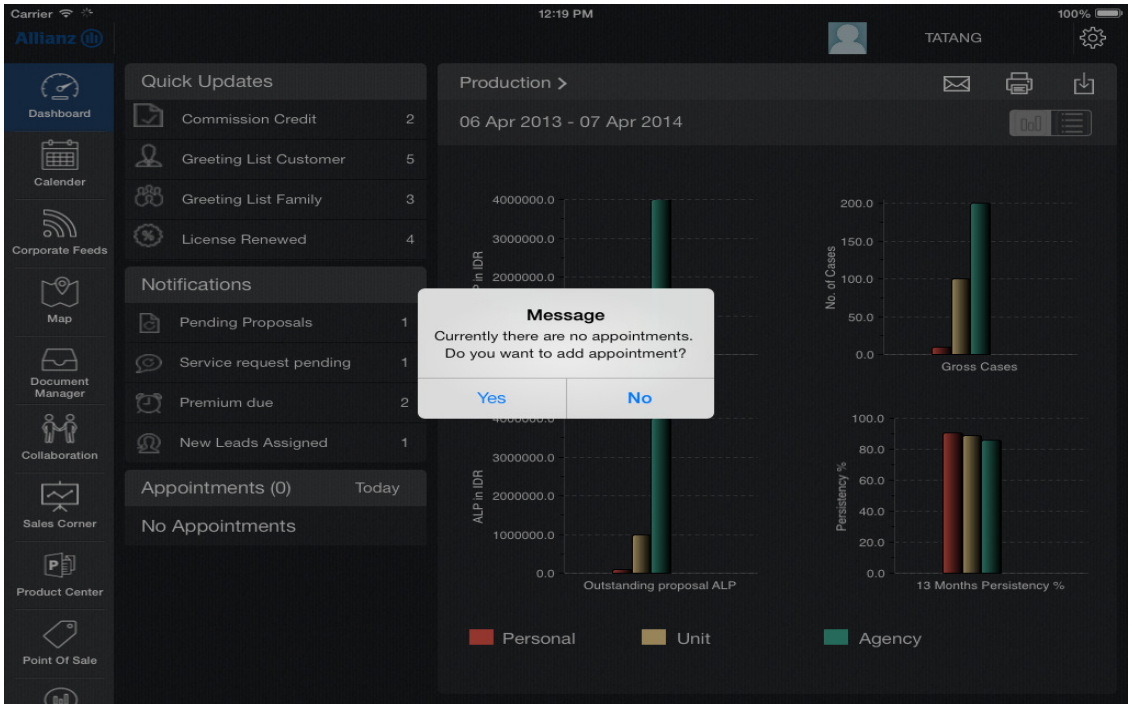

Figure1.13: Add Appointmsents screen

3. On clicking “Yes” Appointment creation page appears

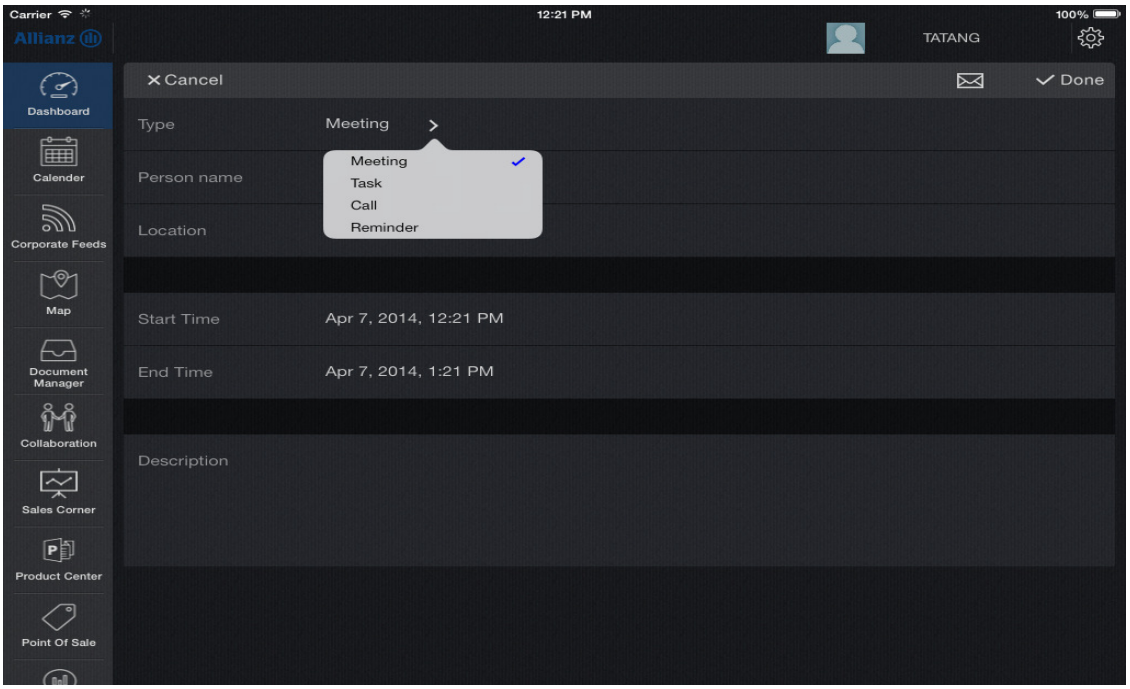

Figure1.14: Add Appointmnet screen

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4. Agent can select appointment type from the list.
5. On clicking "Done" appointment will be added successfully to the iPad local db
6. Agent can also mail on clicking mail icon

3.6 Calendar

1. Click on Calendar icon from vertical left menu
2. Agent can view today's appointments and can also create appointments from calendar
3. Agent has following options to view in Calendar:

a. Scheduled Appointments

b. Premium Due List

c. Greeting List

d. Proposals completed

e. License renewal list

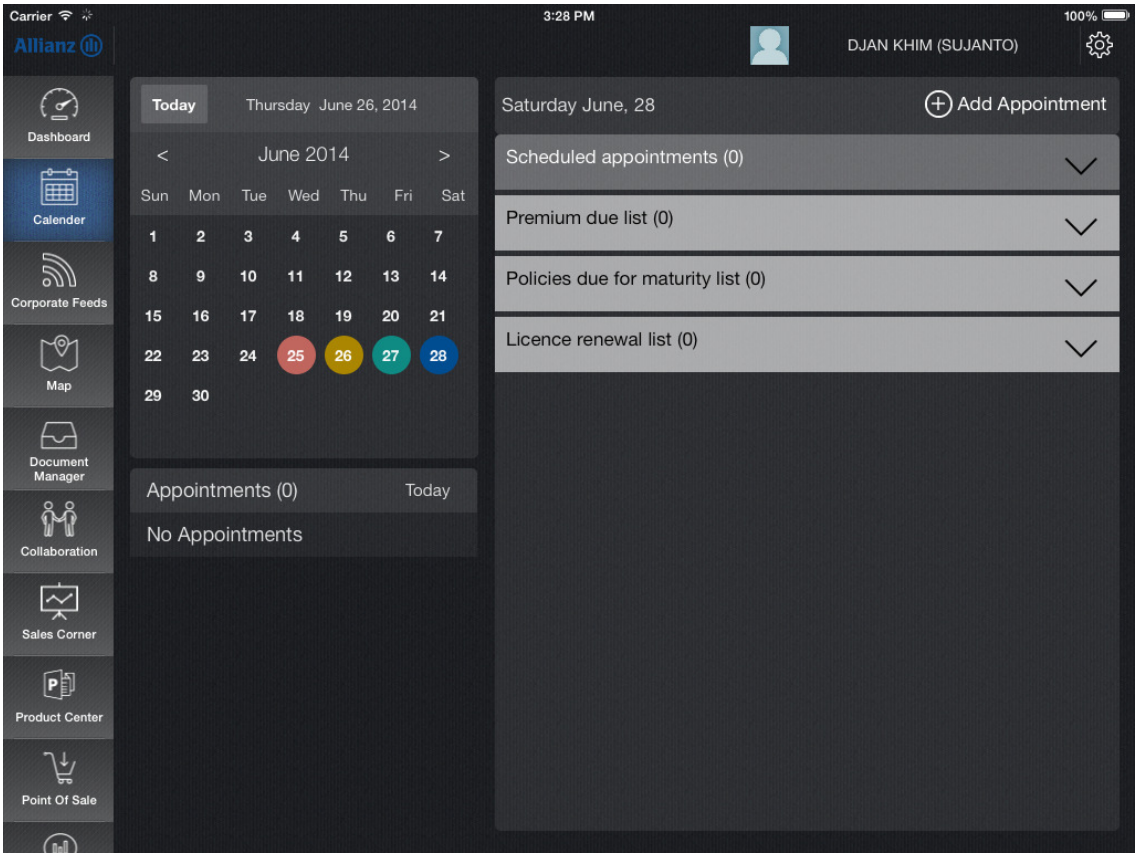

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Figure1.15: Calendar screen

3.7 Corporate Feeds

1. Click on Corporate Feeds icon from vertical left menu

2. Agnet can view today's feeds by default and if today's feeds are not available then feeds will appear in descending order by date.

3. Agnet can select feed type on clicking >

4. Agent can also sort feeds by title and date

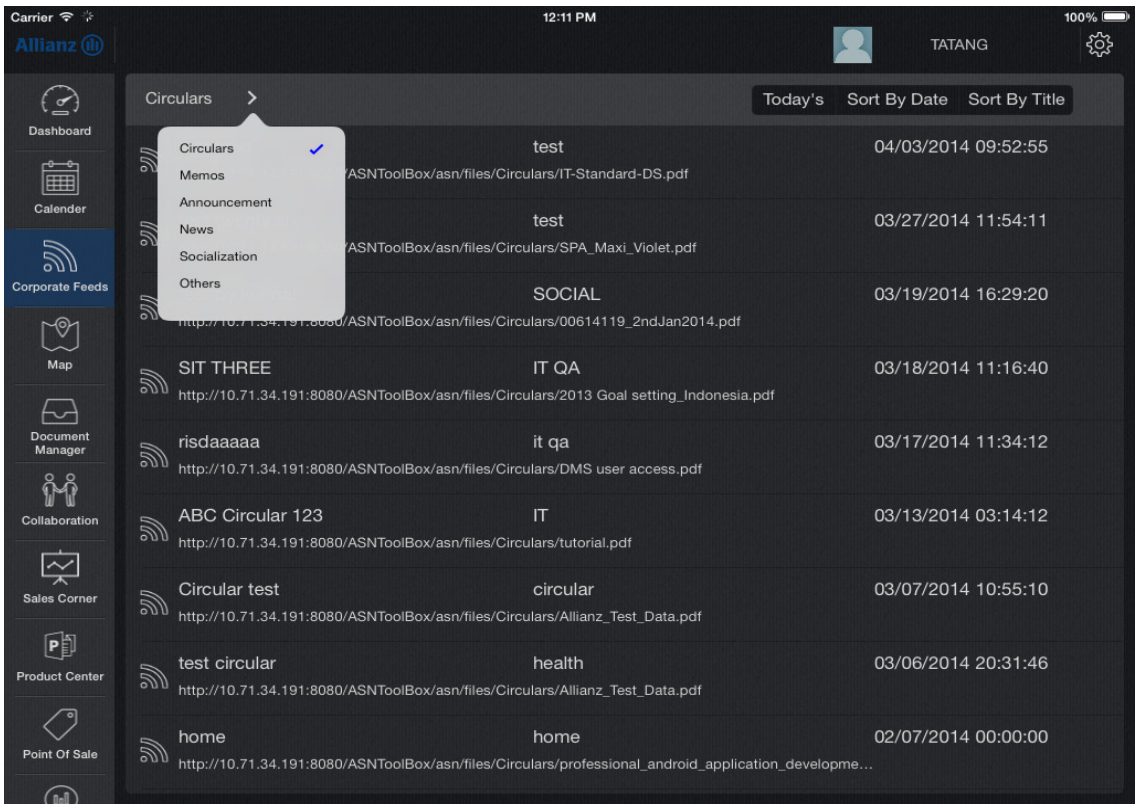

Figure1.16: Corporate feeds screen

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3.8 Document Manager

1. Click on Document Manager icon from vertical left menu

2. By default, “Products” related documents appears on the screen.

3. Agent can select the documents type from the list of available document type

5. Agent can also sort documnets by Name and date

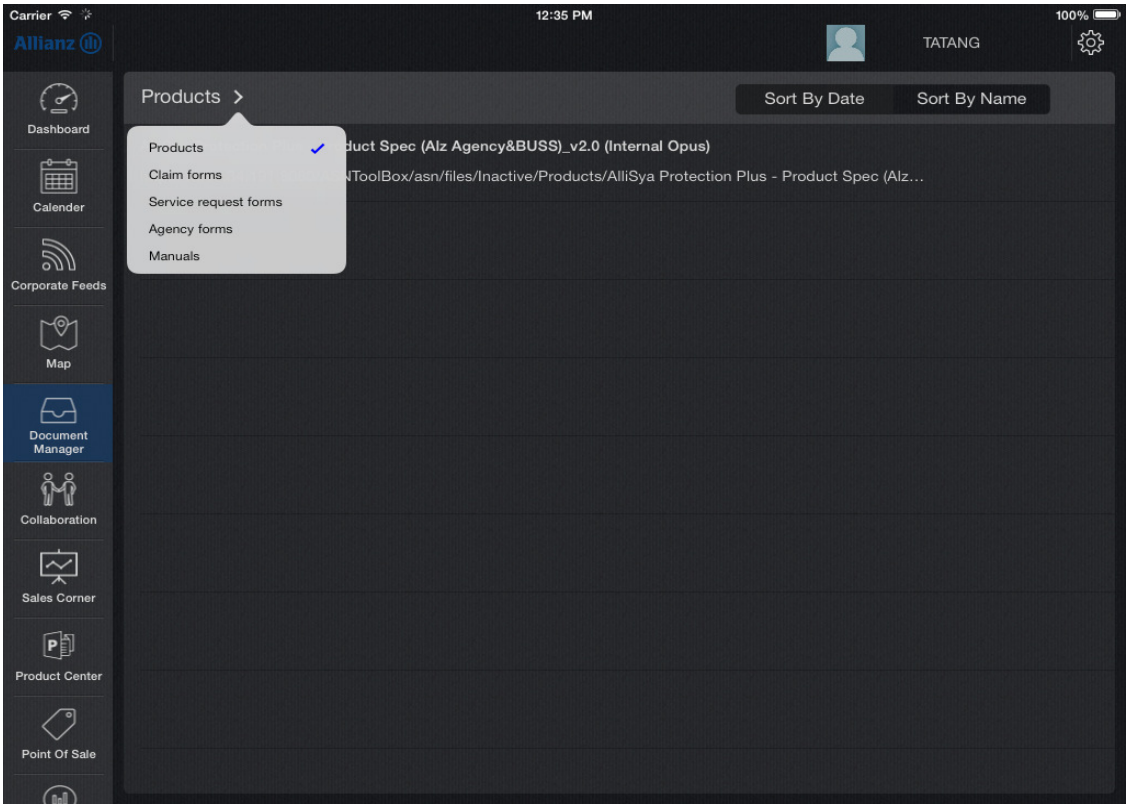

Figure1.17: Document Manager screen

3.9 Map

1. Click on Map icon from vertical left menu
2. By default, Agent training centers within 20 miles, will appear on map depending on the user's current location.
3. User can select the range from the range selection option on the screen.

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4. Agent can select the adress, for which he wants to see entities/activities from the first drop down.

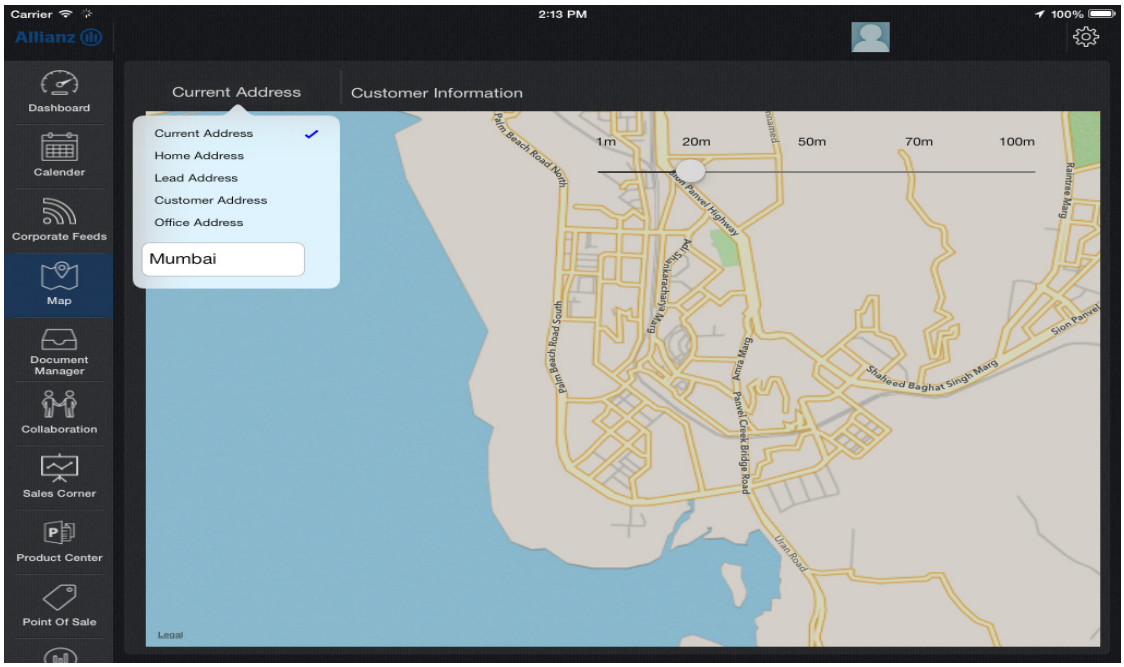

Figure1.18: Map Address selection screen

5. Agent can select activities/entities from the second drop down.

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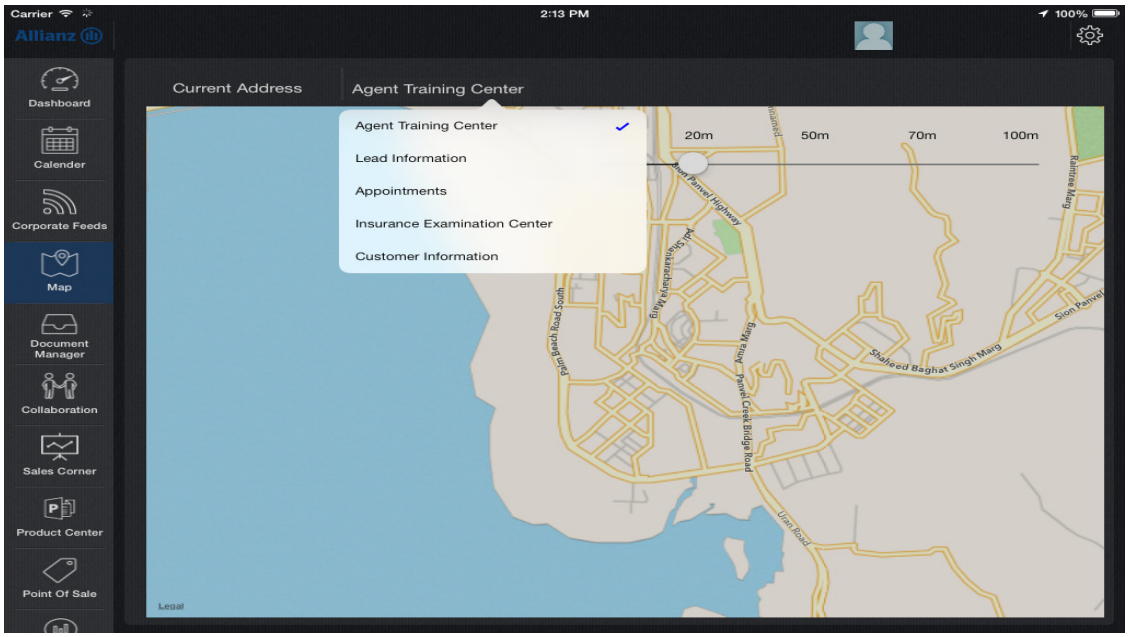

Figure1.19: Map Activity/Entity selection screen

6. In case of lead addres and customer address, agent has option to select location services like: Allianz offices, doctor panel, diagnostic Centers and clinics from second drop down.
7. Agnet has option for mail, message(iMessage) and facetime in Lead Information and Customer Information

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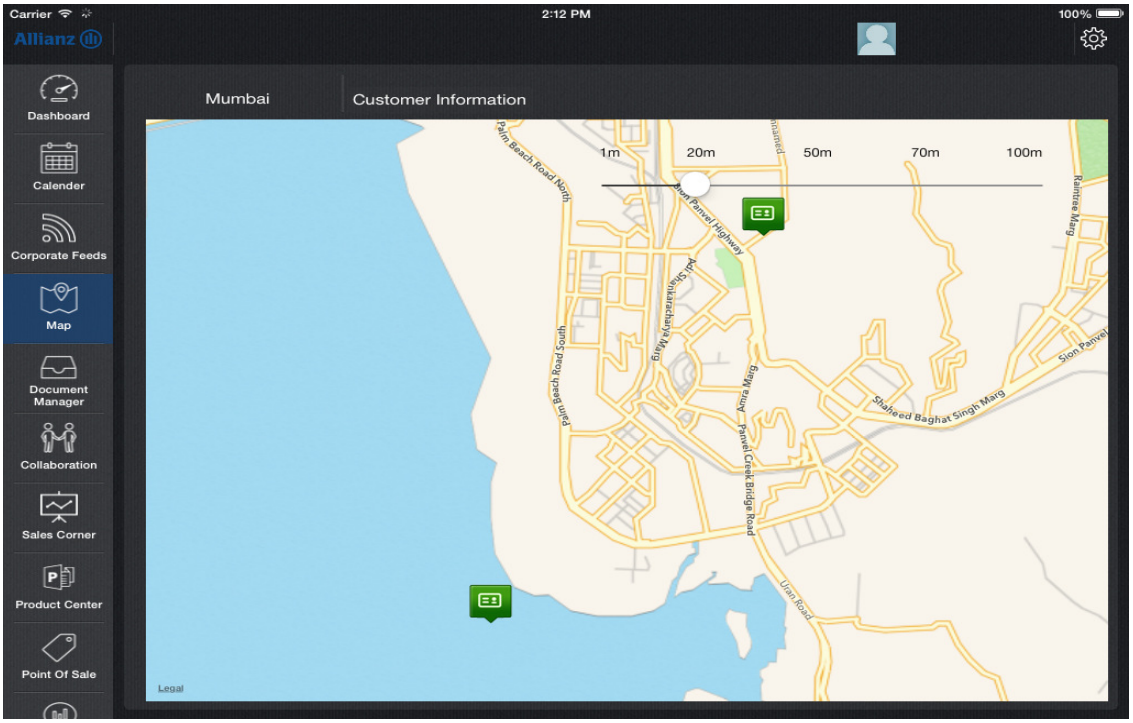

Figure1.20: Map – Customer info based on the manully entered address screen

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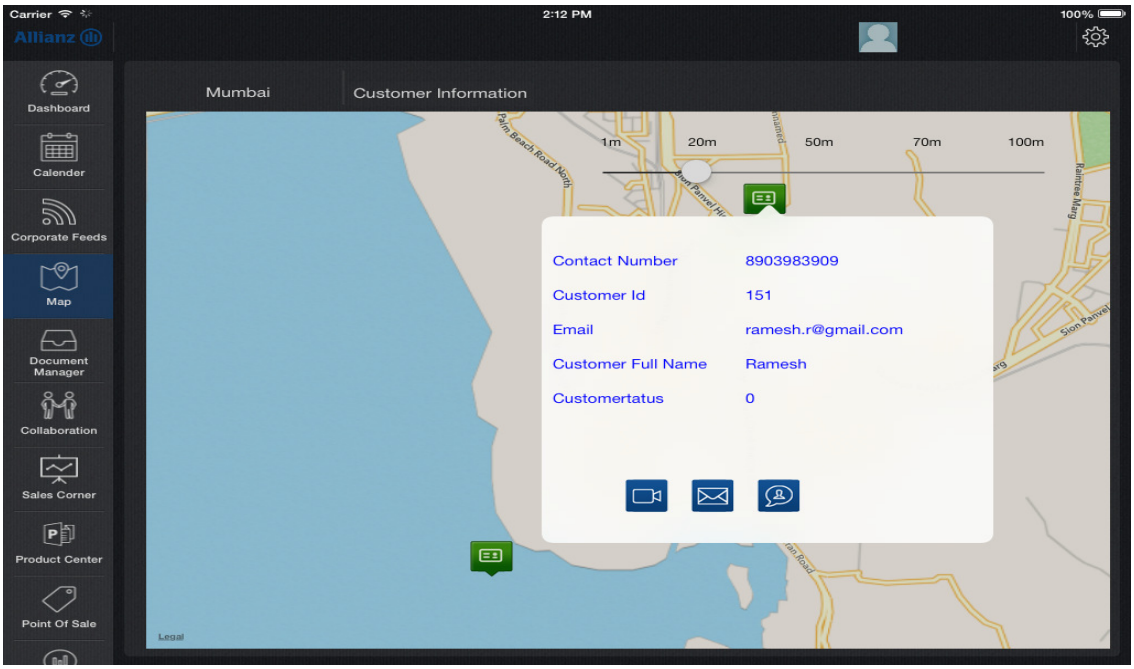

Figure1.21:Map – Customer info details screen

3.10 Collaboration

1. Click on Collaboration icon from vertical left menu
2. List of contacts form ipad phone book appears on the screen, if ipad phone book have contacts.
3. Agent can also have list of his Customers and leads assigned to him
4. Agent has following tools:
   a. Voice recorder
   b. Camera
   c. iMessage
   d. Mail
   e. Facetime
   f. connect through facebook and twitter.
5. All these tools will be visible to user based on the access rights given to him.
6. Agent can also set meeting ot call with leads or customer from here by clicking on appointment icon.
7. Agent can view voice recordings and photos by clicking on arrow icon on top left.

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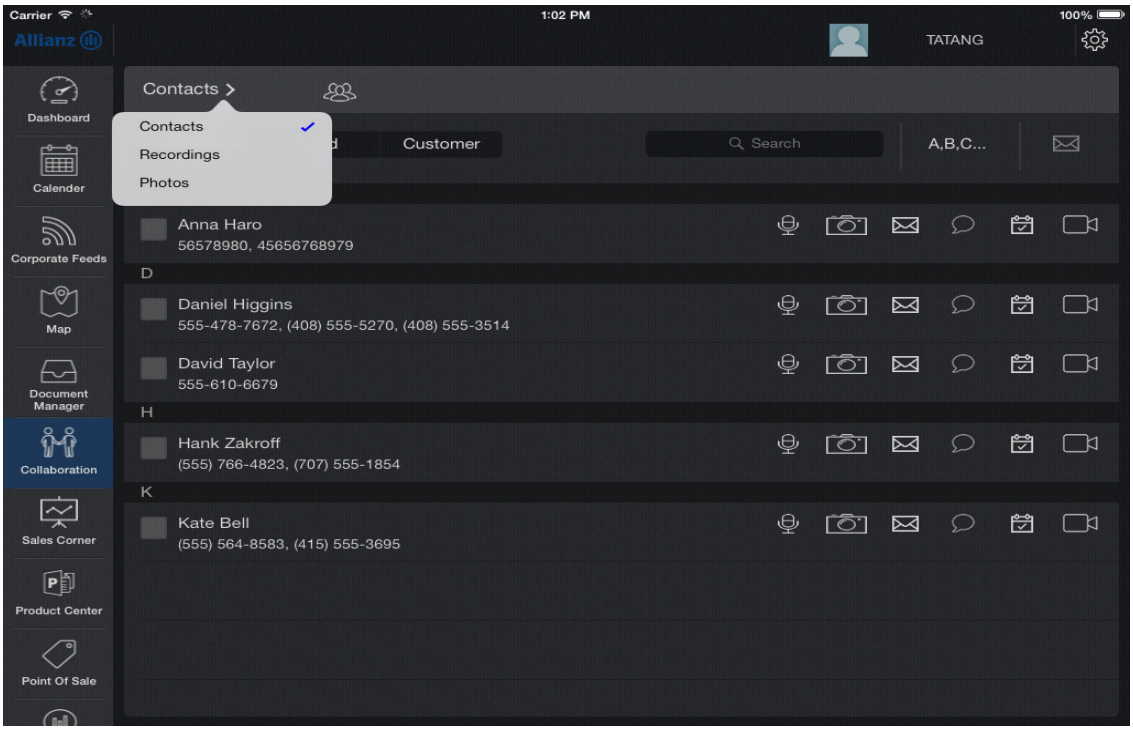

Figure1.22:Collaboration screen

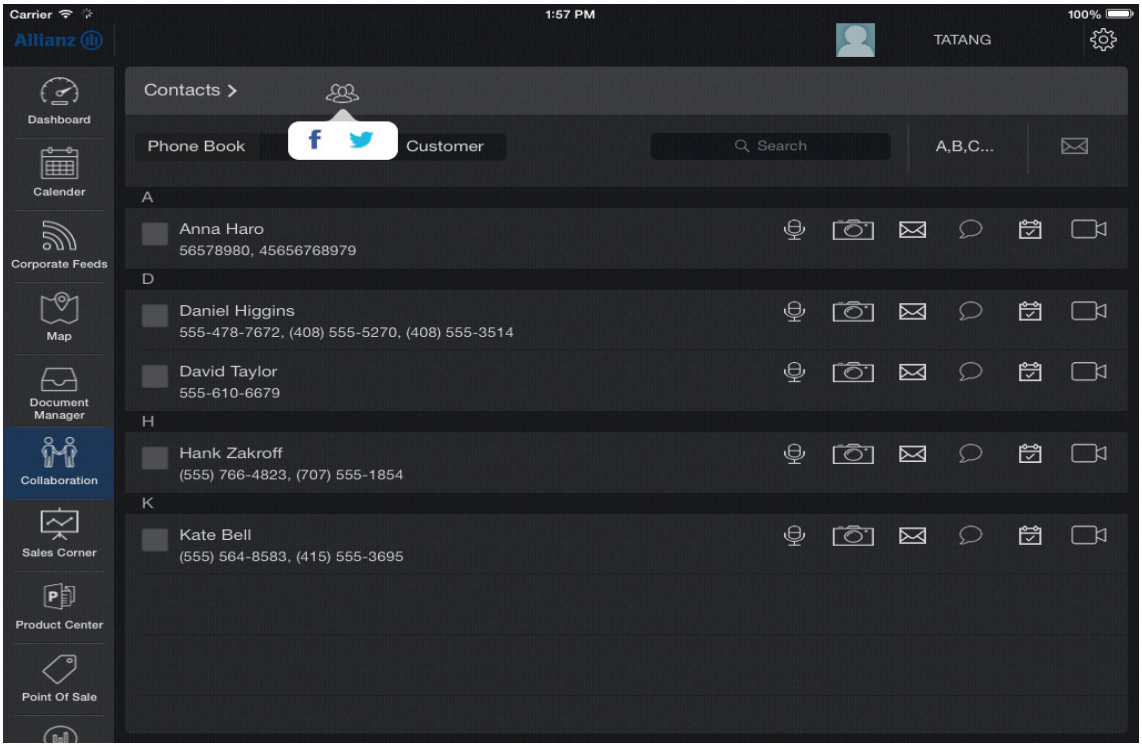

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Figure1.23:Collaboration- connect to social media screen

4. Sales Corner

1. Click on Sales Corner icon from vertical left menu
2. Four sub modules appears
    1. Lead Management
    2. Training Program Schedules
    3. Hierarchy
    4. Financial Planning Tool

4.1 Lead Management

1. Click on Lead Management icon from vertical left menu
2. Agent can create New Prospect on clicking "New Prospect" icon
3. He can create prospect either from iPad phone book contacts or can add manually

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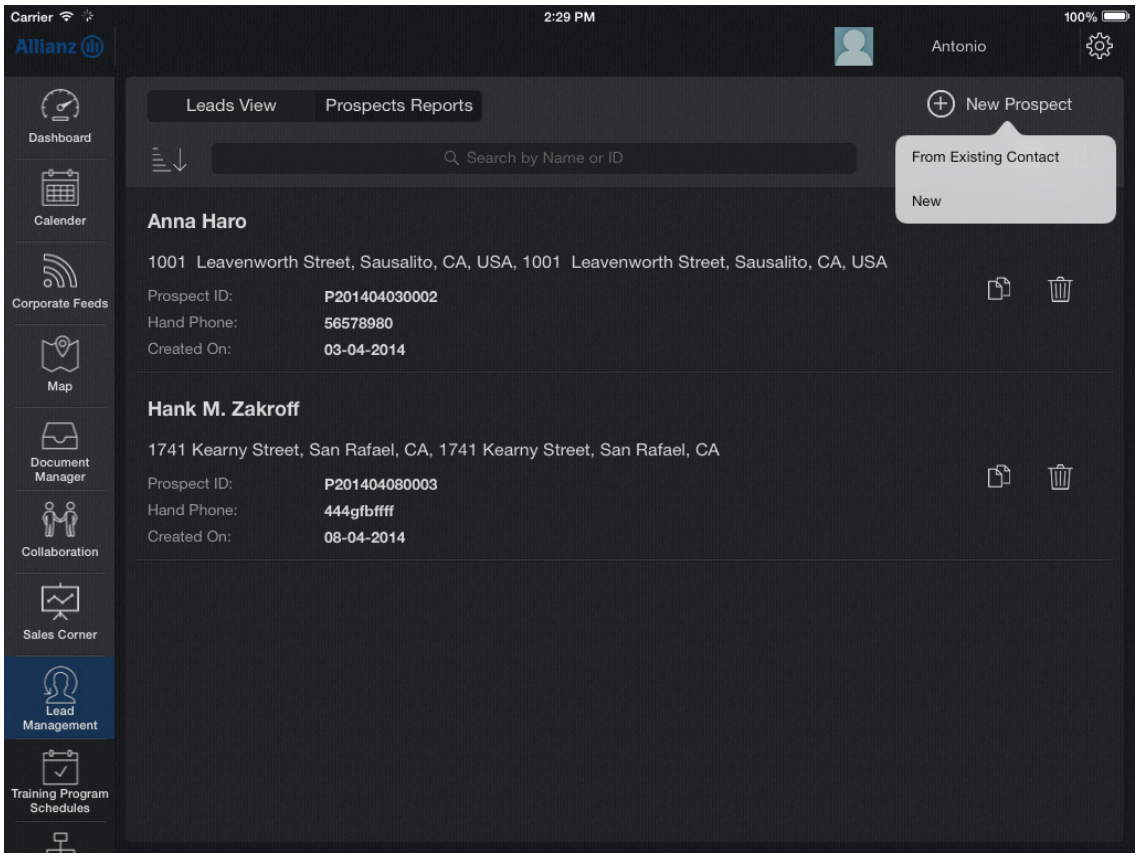

Figure1.24:Lead Management screen

4. Agent can view Prospects Reports

Prospects report can be seen based on all the sources like self, allainz, converted and not converted prospects and month-to-date.

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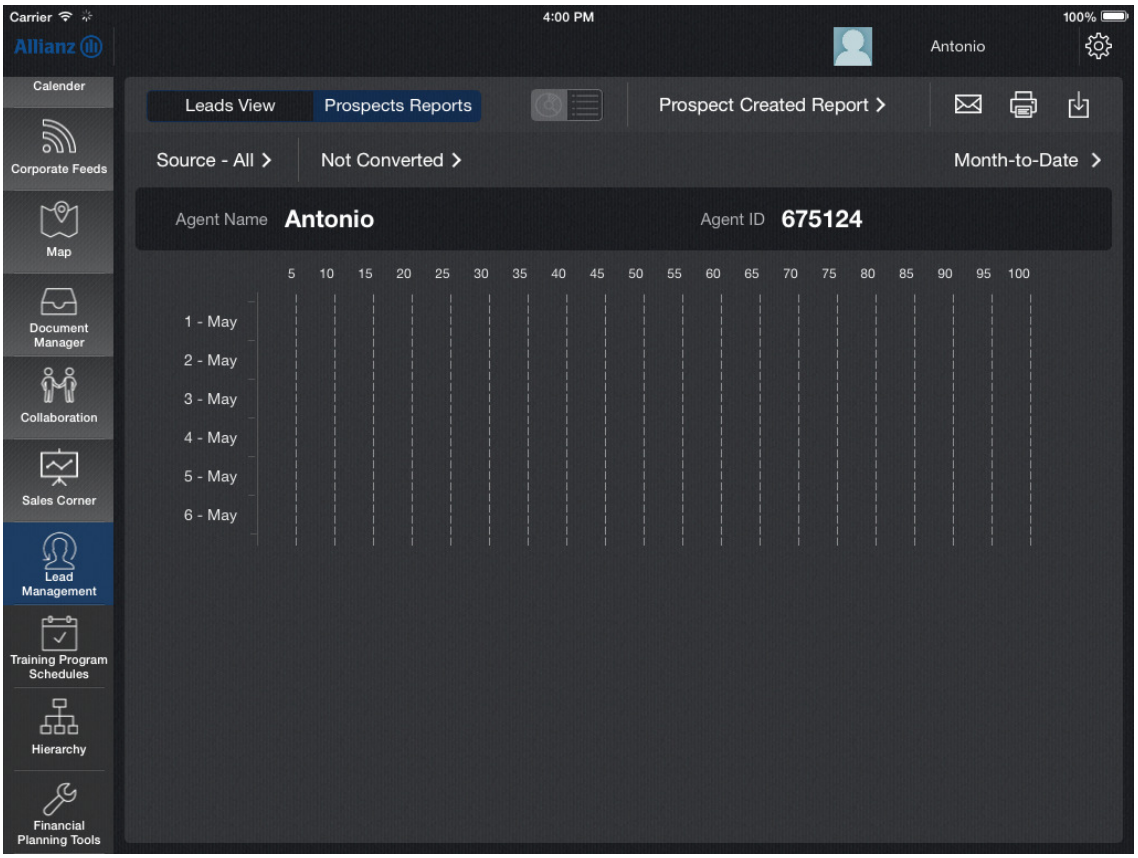

Figure1.25:Lead Report screen

5. Can perform serach based on prospect id or name.

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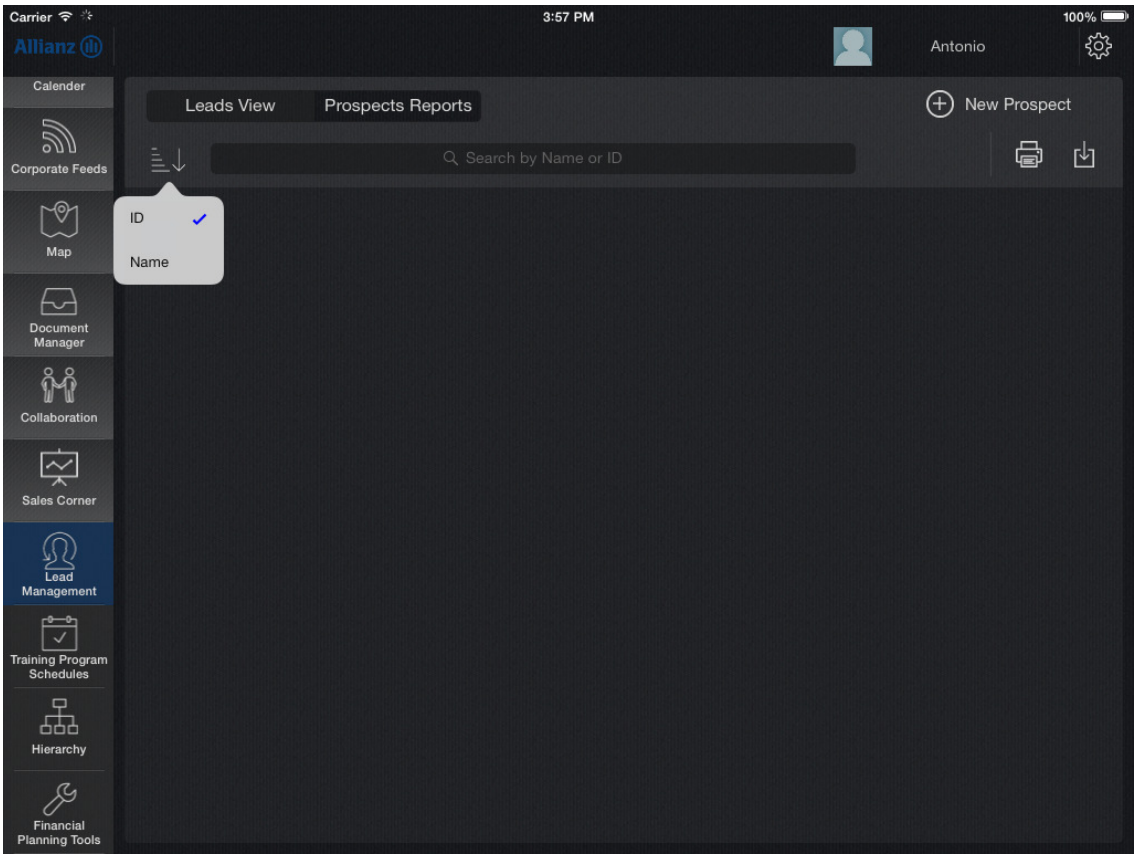

Figure1.26:Lead Search screen

6. User can connect with the prospects using various collaboration tools like iMessage, facetime, mail from the prospect's details page of the

4.2 Training Program Schedules

Tap on 'Training Program Schedules' icon from vertical left menu will display training schedule list. It has following features:

Schedule list can be shared, printed and saved with buttons at top-right corner.

1. **Search** schedules based on class name.
    1. Tap on search bar. This will focus on search bar and display keyboard on screen to enter search term.
    2. Enter search term – a class name

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3. Tap on search button on keyboard.
4. Available results will be displayed on screen.

2. **Sort** schedules in ascending or descending order.
    1. Tap on a column header with up or down arrow to sort schedules in ascending or descending order.

3. **View schedule details**.
    1. Tap on any row with schedule information will navigate to screen with selected schedule details.
    2. Schedule details can be shared, printed and saved with buttons at top-right corner.
4. **View program details**.
    1. Tap on any program name(underlined text) will navigate to screen with selected program details.
    2. Program details can be shared, printed and saved with buttons at top-right corner.
5. **View class details**.
    1. Tap on any class name (underlined text) will navigate to screen with class details.
    2. It provides options to contact with PIC via email and message.
    3. It provides option to view shortest route from device's current location to class and exam center.
    4. Class details can be shared, printed and saved with buttons at top-right corner.

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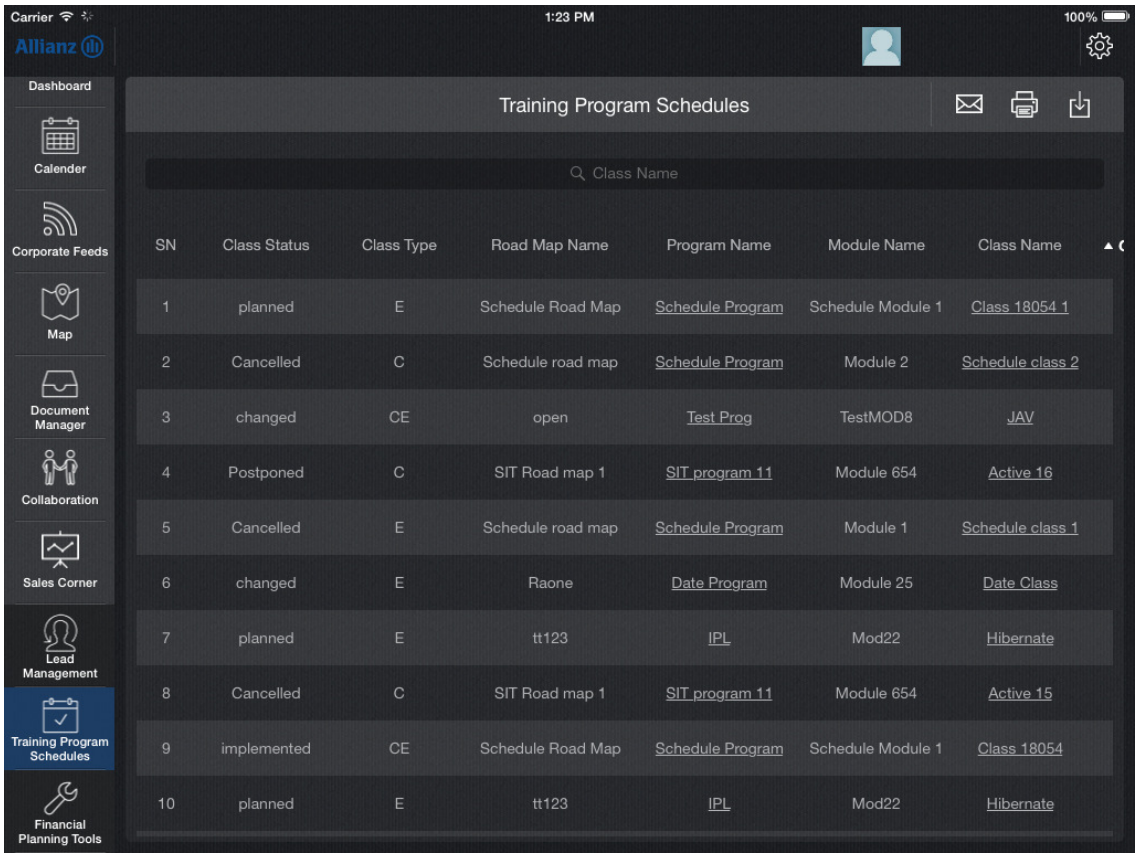
Carrier
1:23 PM
100%
Allianz
Dashboard
Calender
Corporate Feeds
Map
Document Manager
Collaboration
Sales Corner
Lead Management
Training Program Schedules
Financial Planning Tools
Training Program Schedules
Class Name
SN
Class Status
Class Type
Road Map Name
Program Name
Module Name
Class Name
1 planned E Schedule Road Map Schedule Program Schedule Module 1 Class 18054 1
2 Cancelled C Schedule road map Schedule Program Module 2 Schedule class 2
3 changed CE open Test Prog TestMOD8 JAV
4 Postponed C SIT Road map 1 SIT program 11 Module 654 Active 16
5 Cancelled E Schedule road map Schedule Program Module 1 Schedule class 1
6 changed E Raone Date Program Module 25 Date Class
7 planned E tt123 IPL Mod22 Hibernate
8 Cancelled C SIT Road map 1 SIT program 11 Module 654 Active 15
9 implemented CE Schedule Road Map Schedule Program Schedule Module 1 Class 18054
10 planned E tt123 IPL Mod22 Hibernate

Figure1.27:Training Program Schedules screen

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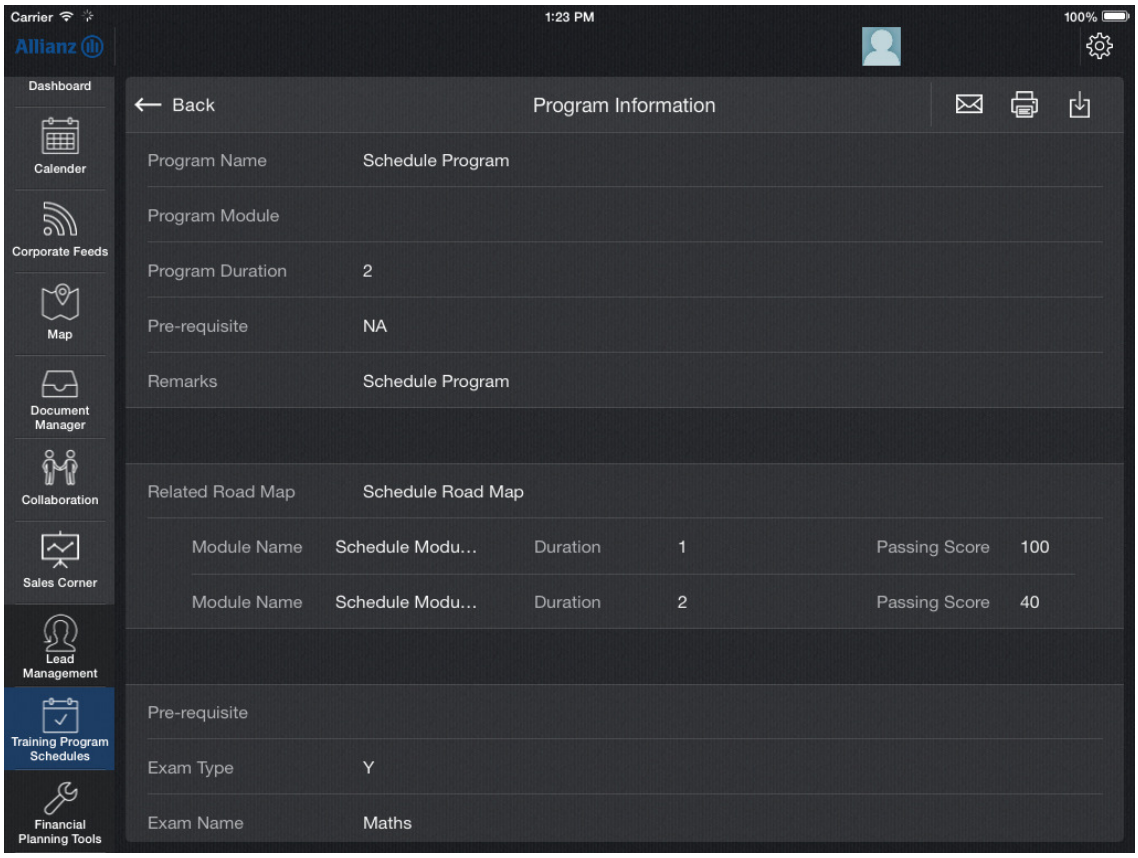

Figure1.28:Training Program Information screen

4.3 Hierachy

Tap on hierarchy icon will display Hierarchy information on screen. This feature is accessible to BP level agents only.

It provides 2 types of hierarchy information – Overriding Generation and Overriding Direct Unit.

1. **View overriding generation**

   Tap on 'Overriding Generation' button will display screen with multiple generations for logged in user.

   1. **Show/Hide Generation –** Tap on 'Generation 1', 'Generation 2' etc. buttons will show or hide selected hierarchy.
   2. **View additional details** for agent in hierarchy
   3. **Drill Down –** Tap on view more details for an agent will display all the unit and personal level agents under selected agent.

2. **View overriding direct unit**

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Tap on 'Overriding Direct Unit' button will display all direct level agents for logged in user.

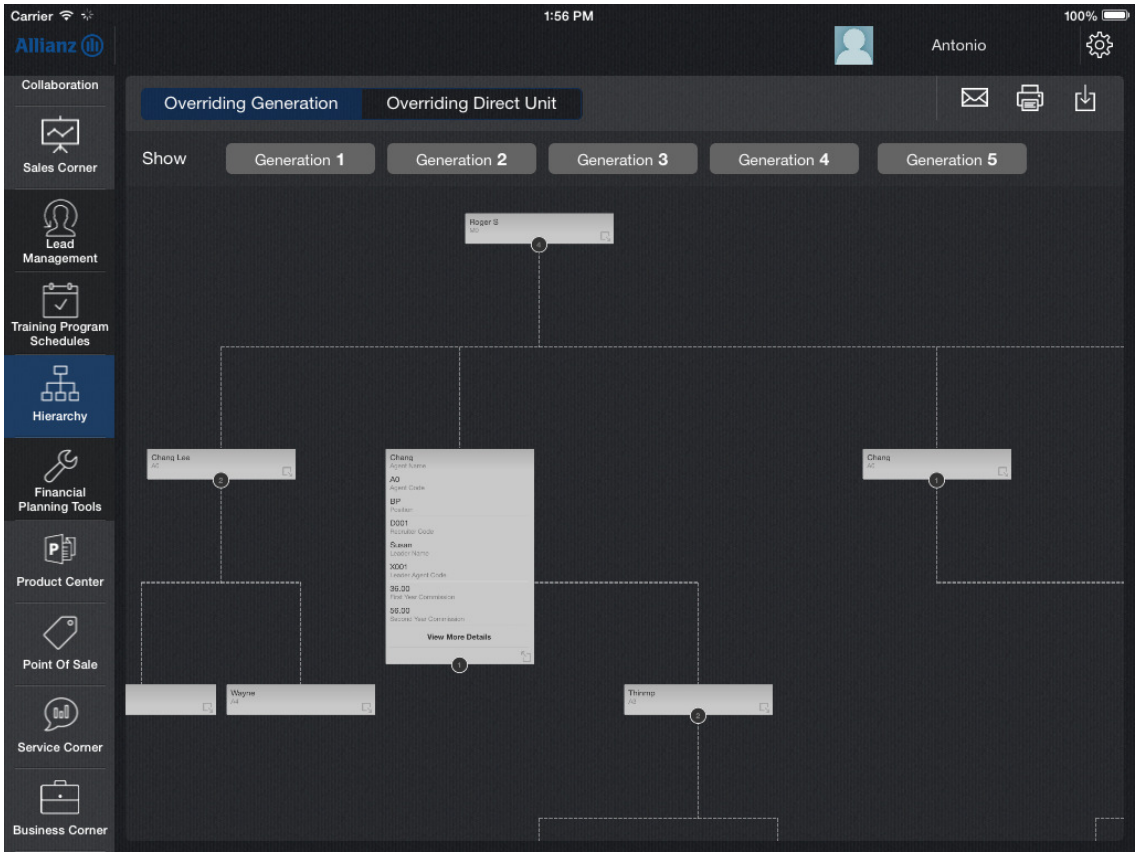

Figure1.29:Hierarchy Overriding Generation screen

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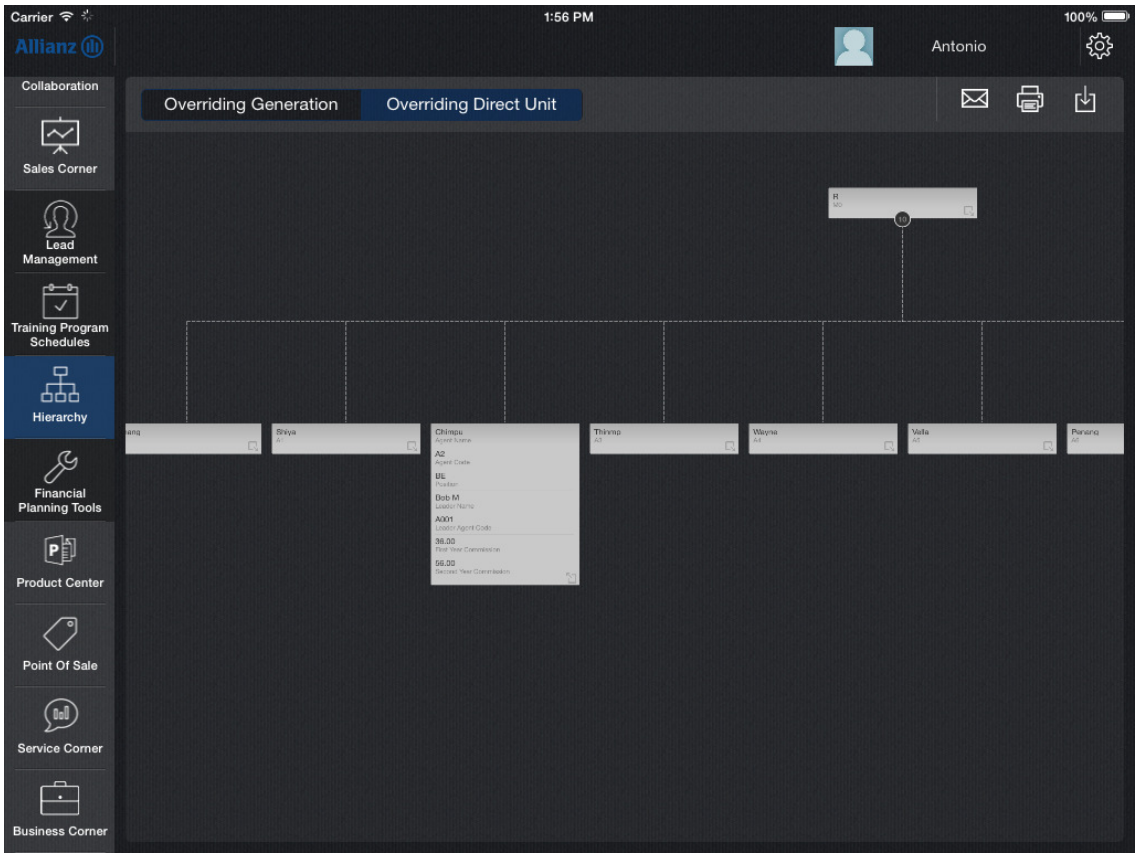

Figure1.30:Hierarchy Overriding Direct Unit screen

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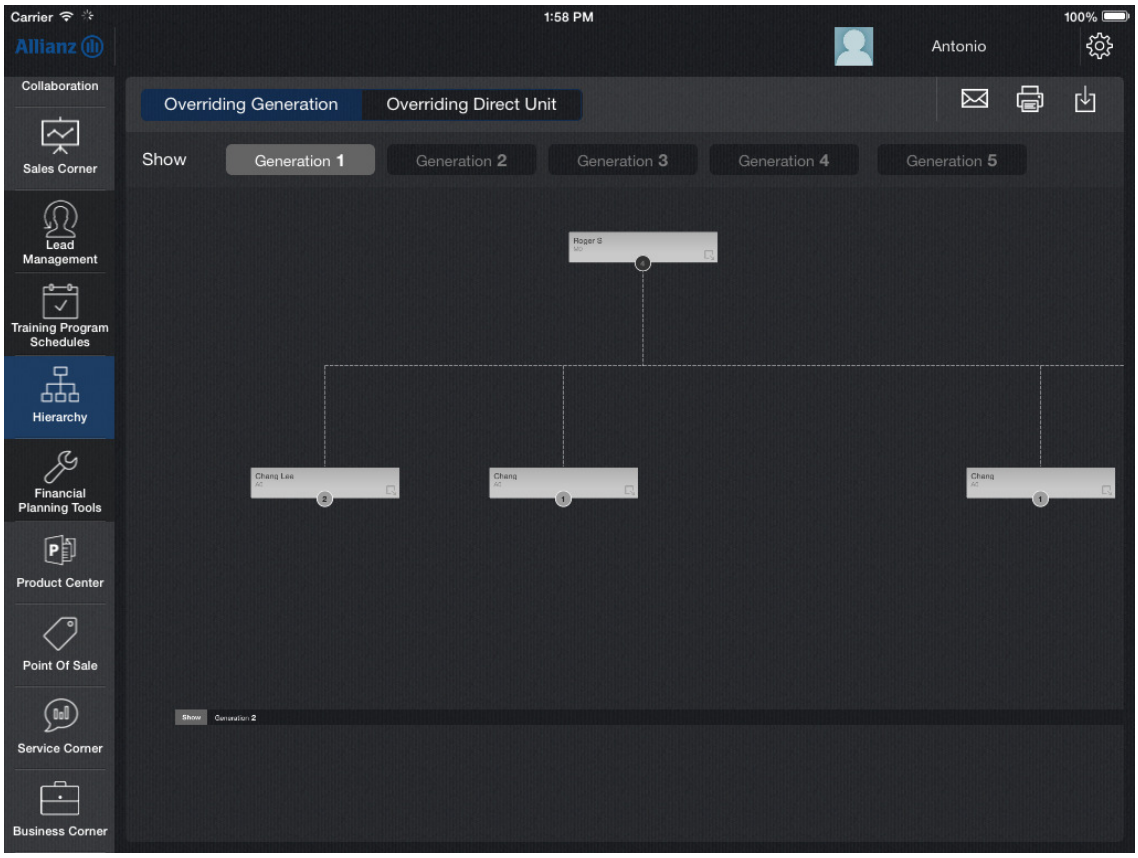

Figure1.31:Hierarchy Overriding Generation1 screen

4.4 Financial Planning Tool

1. Tap on Financial Planning Tool icon from vertical left menu, it will display 'My Savings' financial tool.

1. **Calculate 'My Savings'**

    1. Enter 'Initial Investment', 'Periodical Investment', 'Investment Term', 'Expected Return' and 'Periodicity'.
    2. Tap on calculate button at bottom-right corner.
    3. It will display calculated values for following fields
    4. ACCUMULATED AMOUNT of Periodical Investment
    5. INVESTED AMOUNT under Periodical Investment
    6. INTEREST EARNED under Periodical Investment
    7. ACCUMULATED AMOUNT of Initial Investment
    8. INTEREST EARNED under Initial Investment
    9. TOTAL under INVESTED AMOUNT

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10. TOTAL under INTEREST EARNED
11. TOTAL under ACCUMULATED AMOUNT

2. **Reset** calculated values

   Tap on reset button at bottom-left corner will reset all input and output values to initial state.

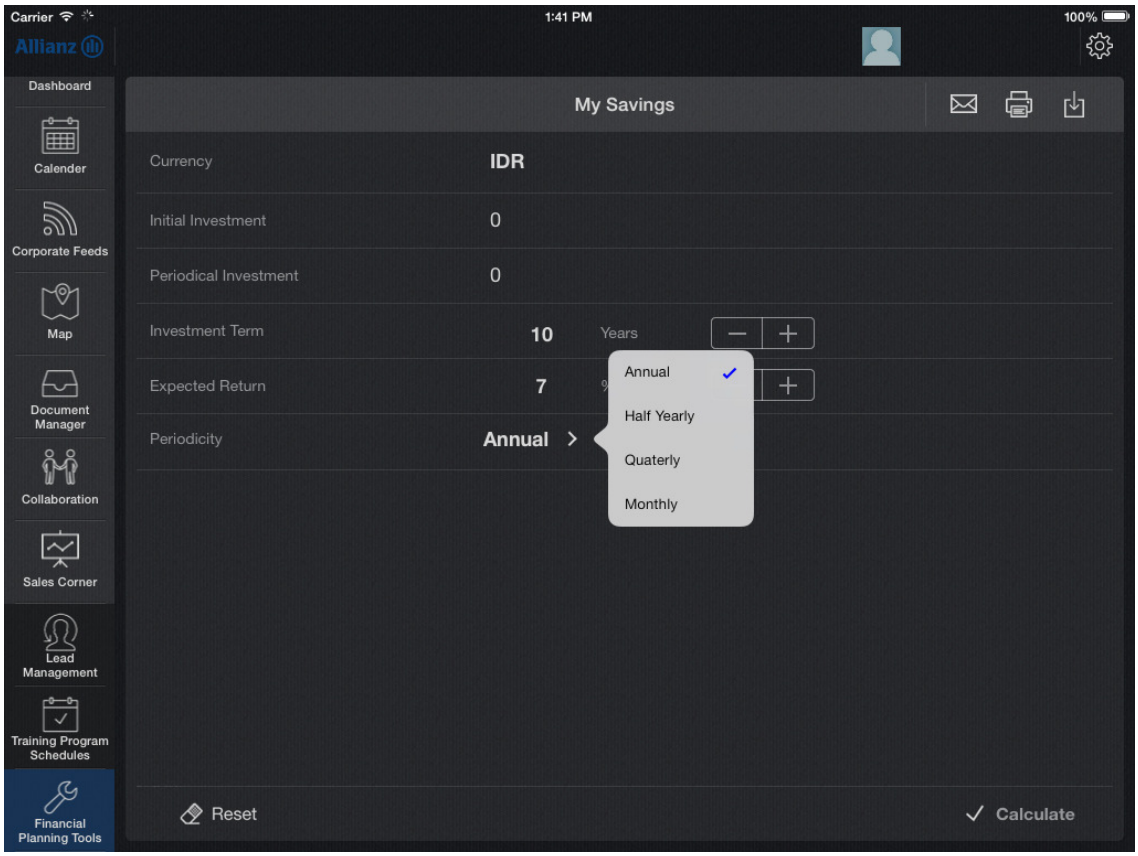

Figure1.32:Financial Planning Tools screen

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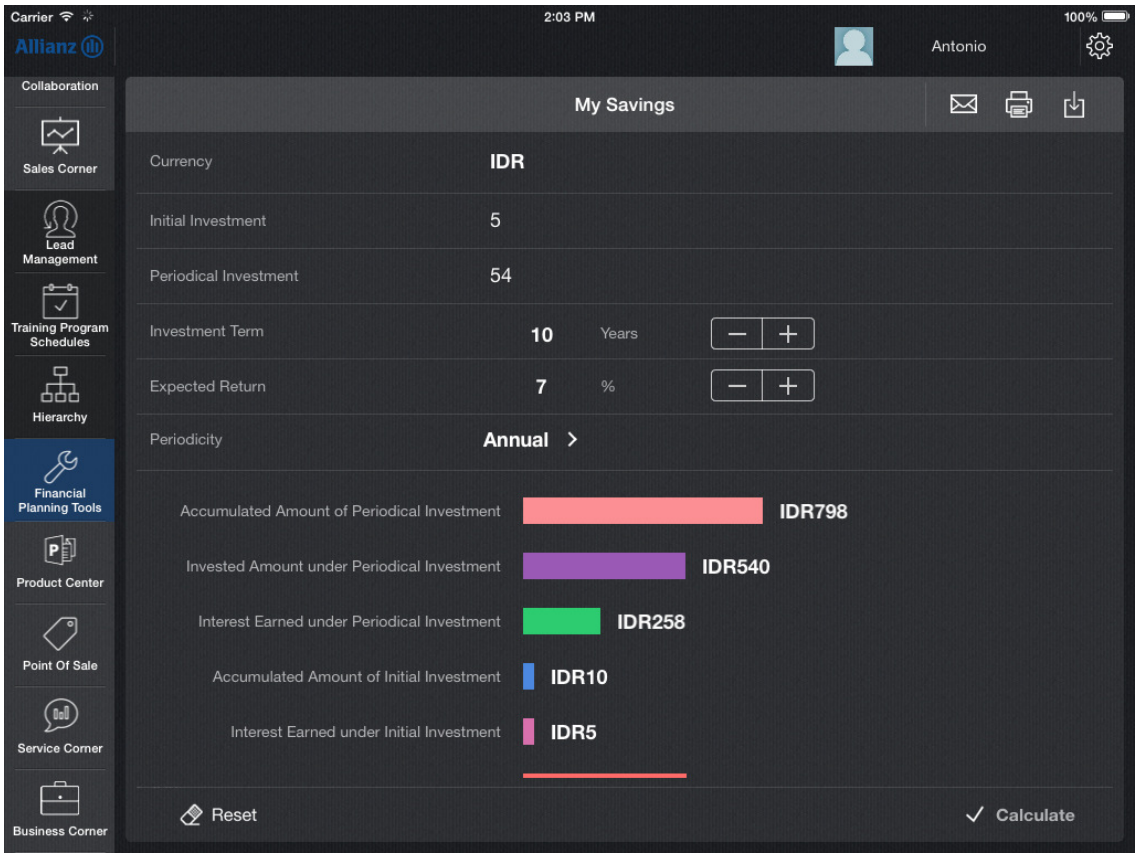

Figure1.33:Financial Planning Tools Calculation screen

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5. Service Corner

1. Click on Service Corner icon from vertical left menu
2. Two sub modules appears
    1. Enquiry
    2. Service Request

5.1 Enquiry

1. Click on Enquiry icon, from vertical left menu.
2. User have option for policy enquiry, proposal enquiry and agent enquiry.

3. User can select type of enquiry from the list of enquiry.

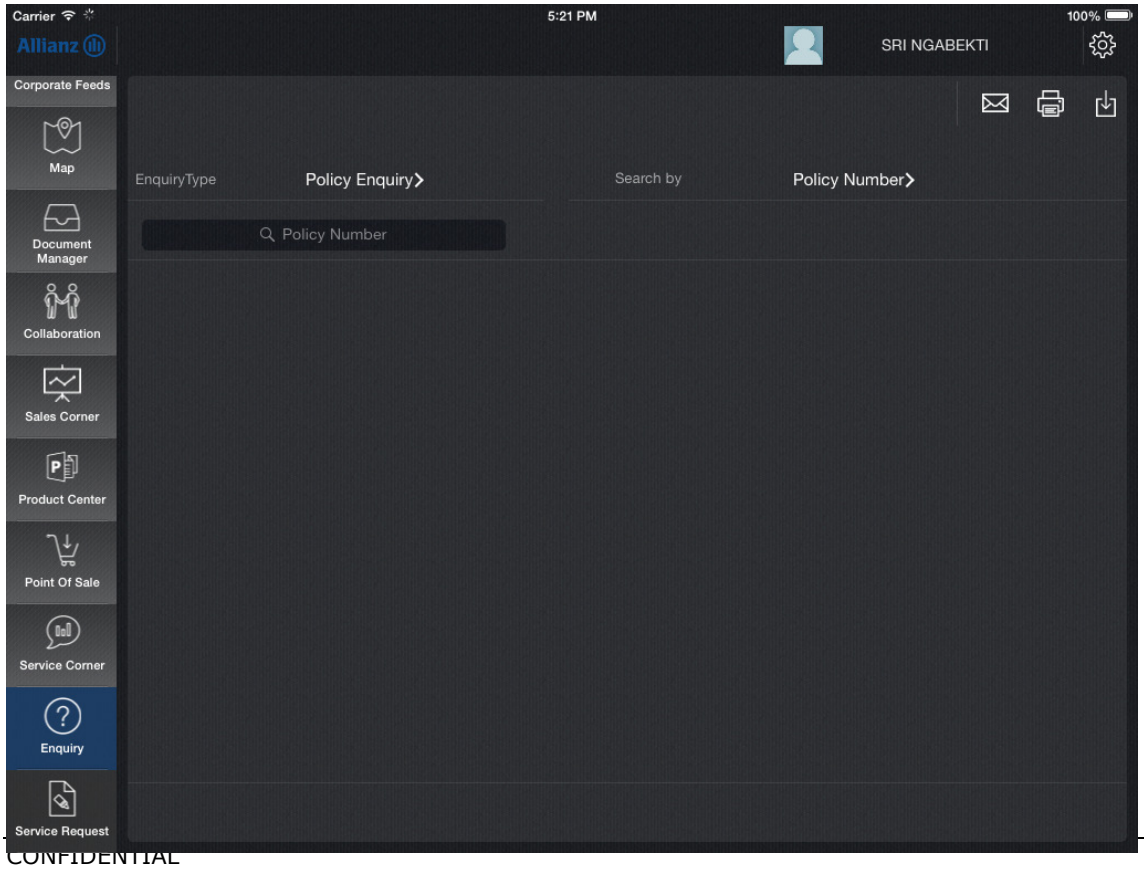

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Figure1.34: select type of Enquiry

4. User can perform enquiry based on Policy number, application number, agent code, license number.

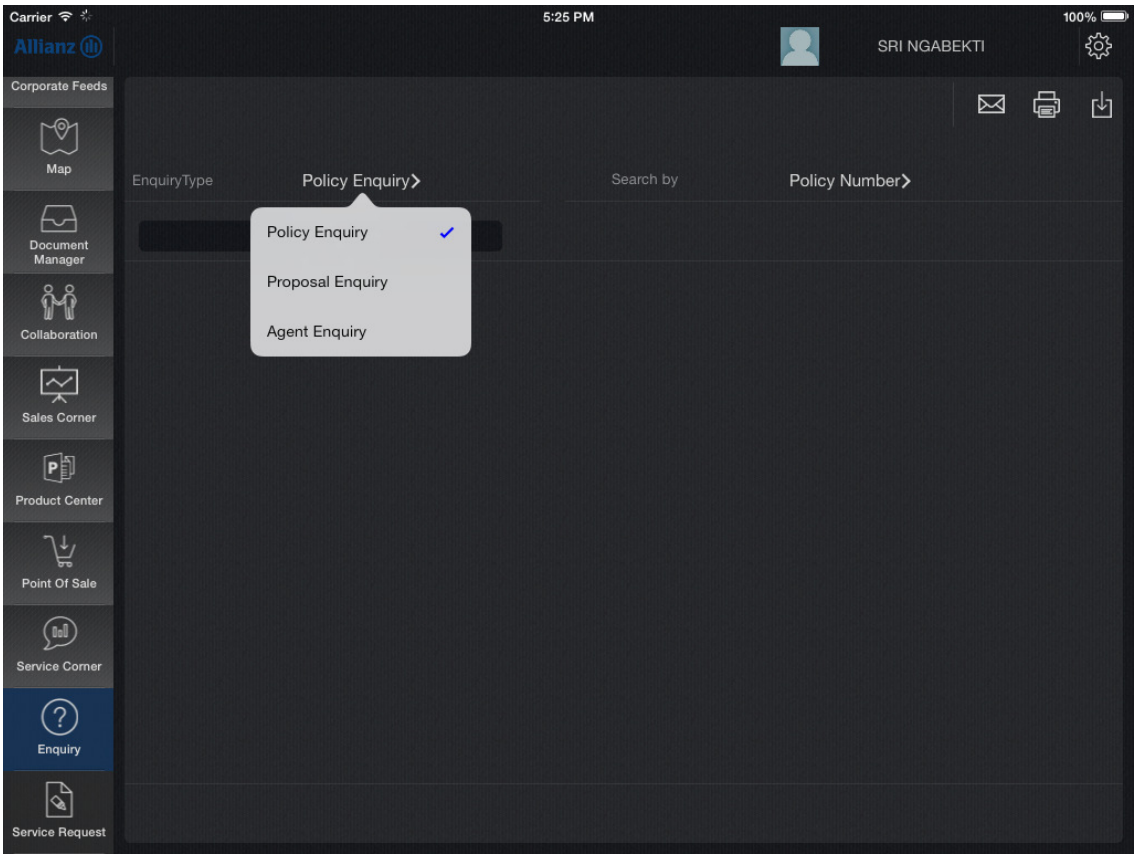

Figure1.35: policy enquiry

5. By default policy Enquiry is selected.
6. On selecting enquiry type and enquiry based on, summary view appears.
7. User can select one from the list of enquiries in summary view.

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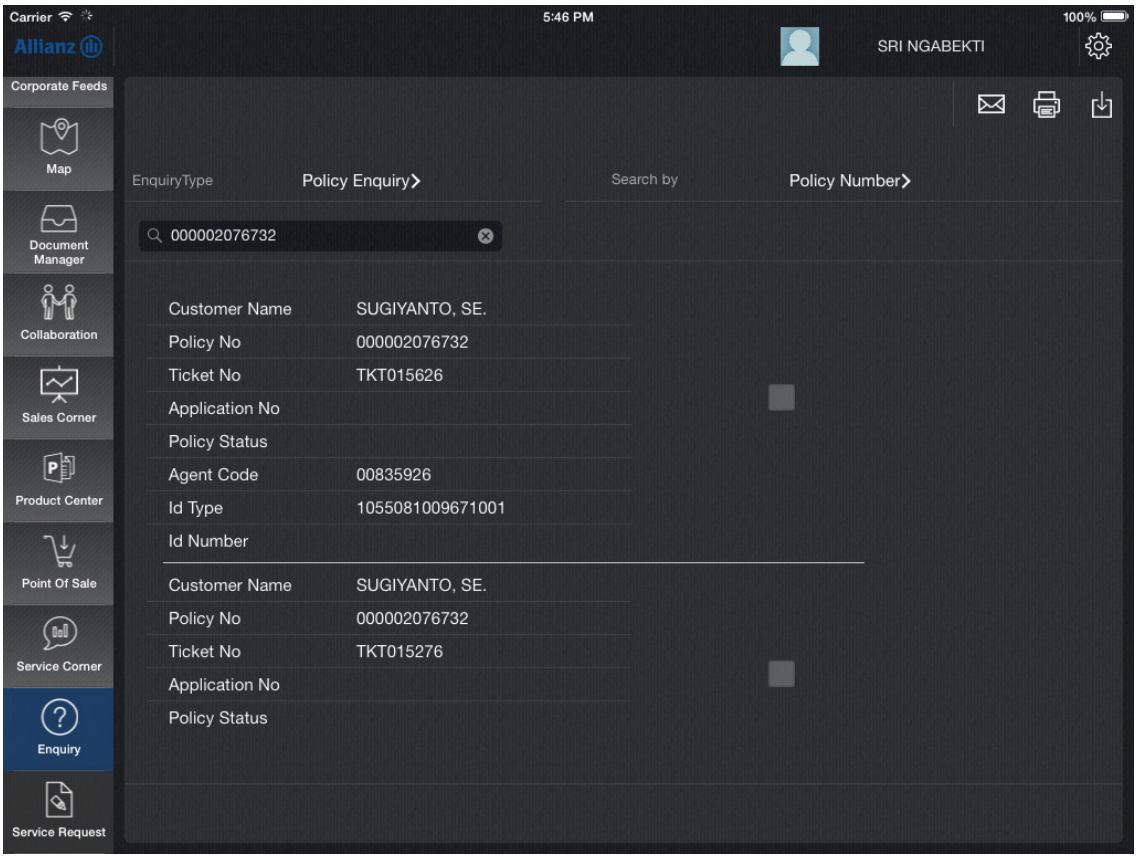

Figure1.36:enquiry summary view

8. User can see the details of enquiry by clicking on “View Detail”.

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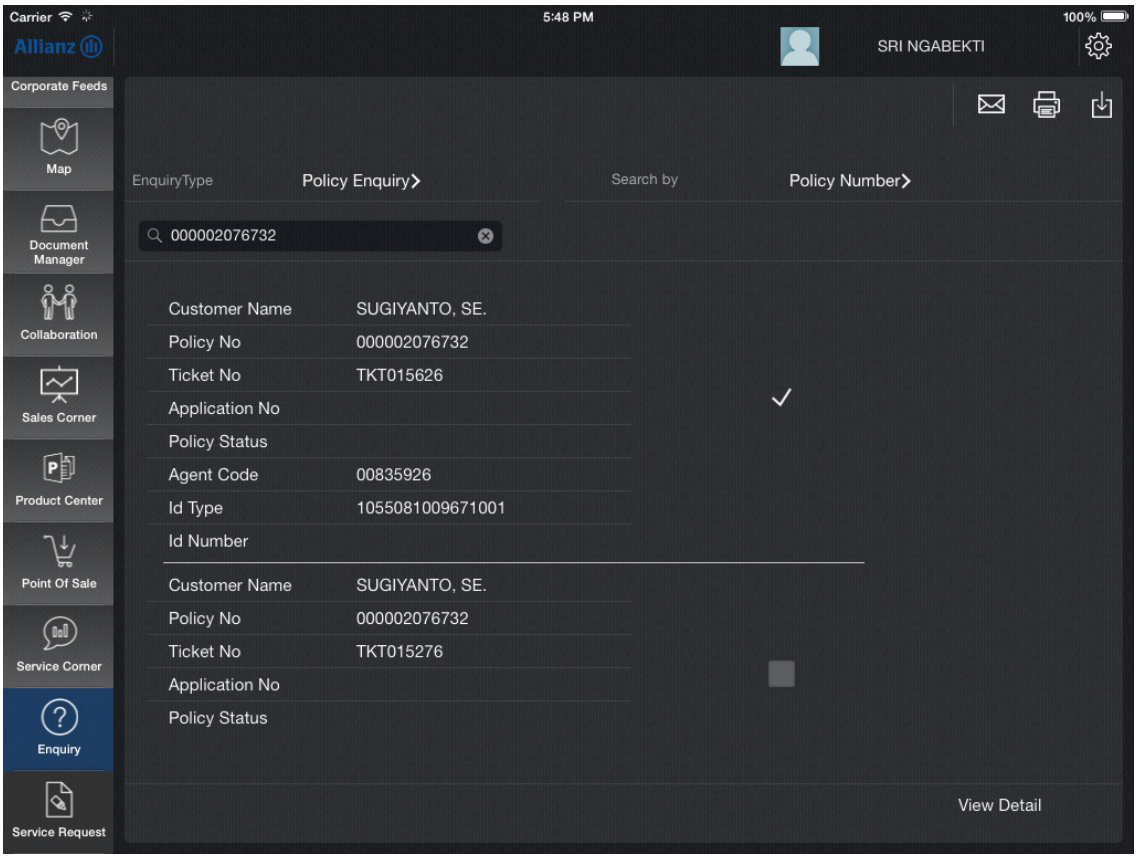

Figure1.37: policy enquiry view detail

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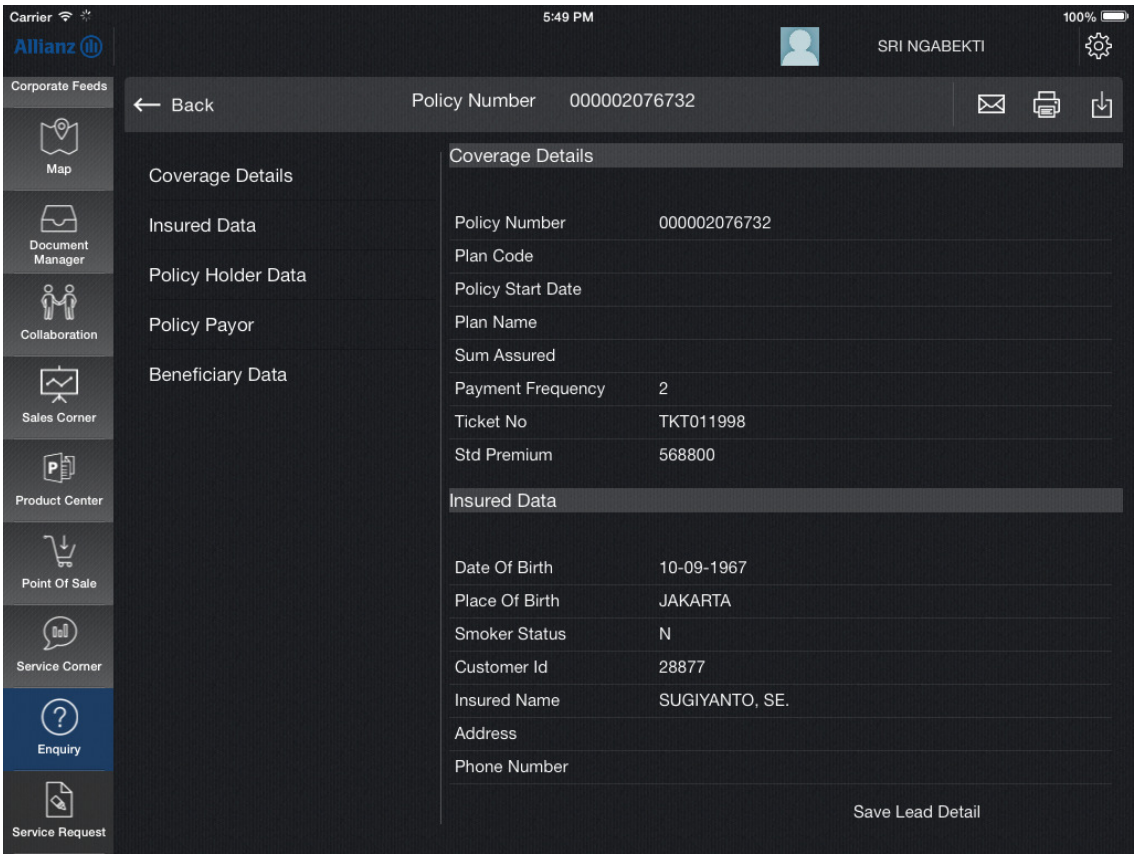

Figure1.38: policy enquiry detail

9. User can mail, print and download summary or details of enquiry by clicking on mail, print and download buttons respectively.

5.2 Service Request

1. Click on Service Request icon, from vertical left menu.
2. New Service Request page appears.

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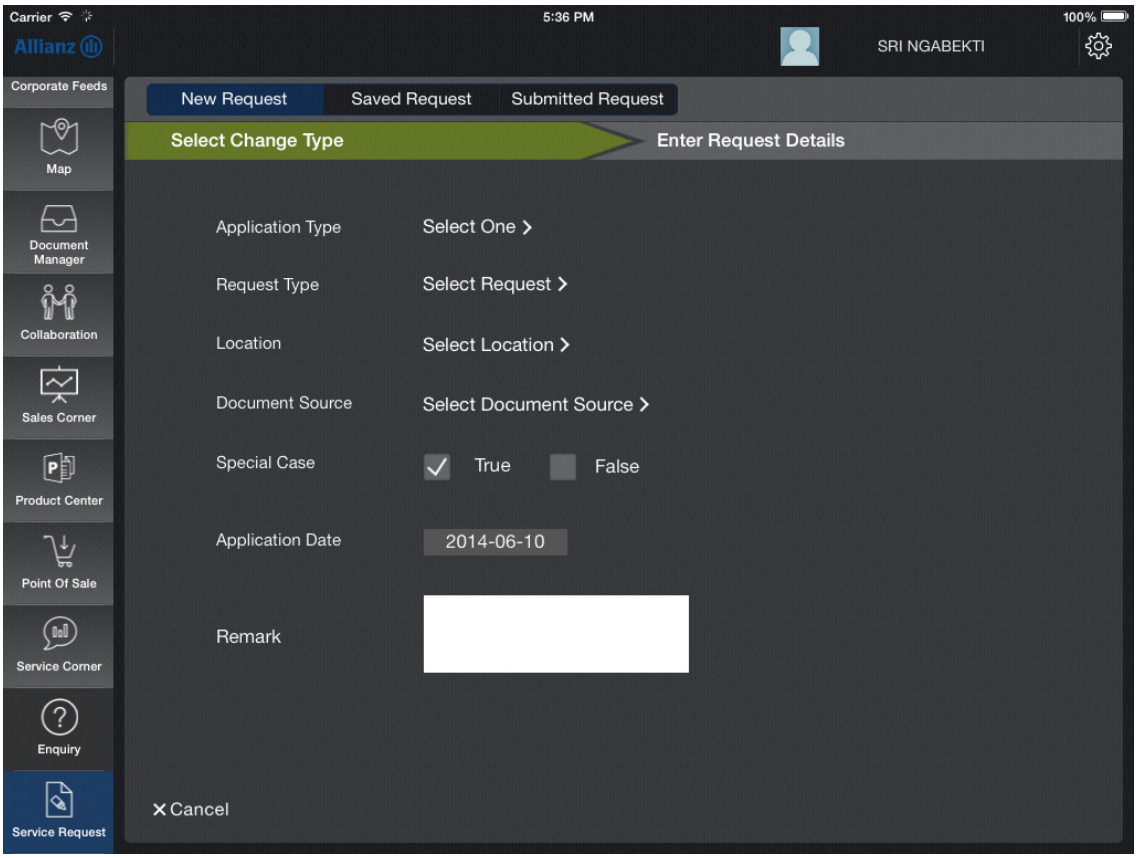

Figure1.39: new service request

3. User can select application type, service request type, location, special case and document source and can fill remarks and application date.

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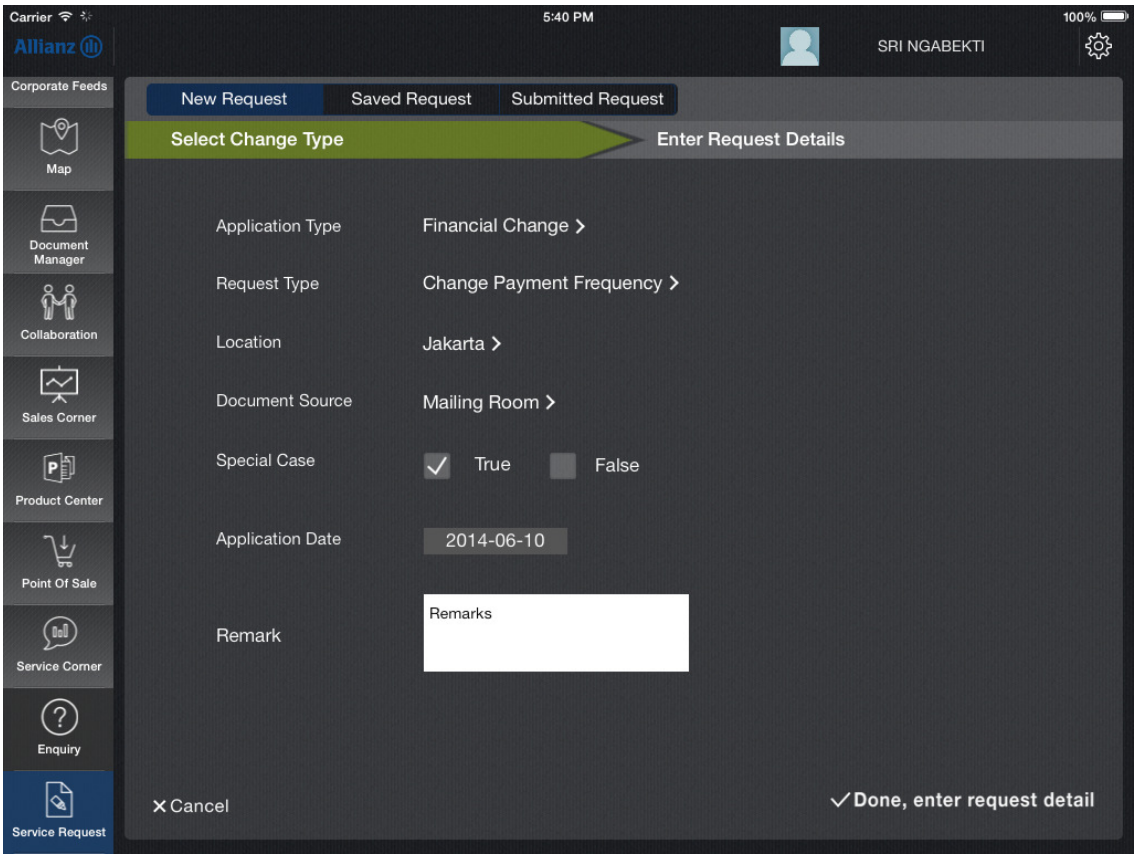

Figure1.40: new service request with required details

4. On filling all the required details, "Done,Enter Request details" button appears.
5. On clicking "Done,Enter Request details" button, new form for selected application type appears.

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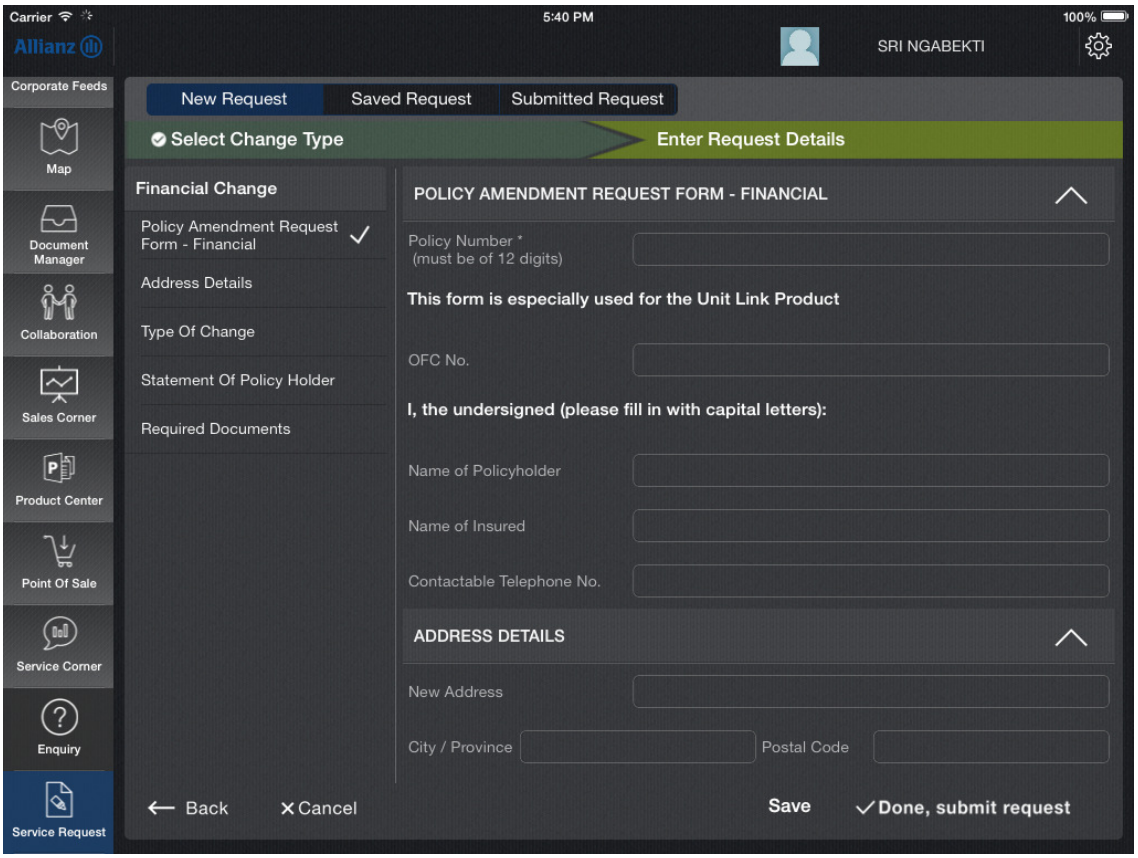

Figure1.41: enter new service request details

6. For each form, some additional documents are required which can be attached by clicking on "Required Documnets" tab. User can select document photos from the photo gallery or can take photo with the help of camera.

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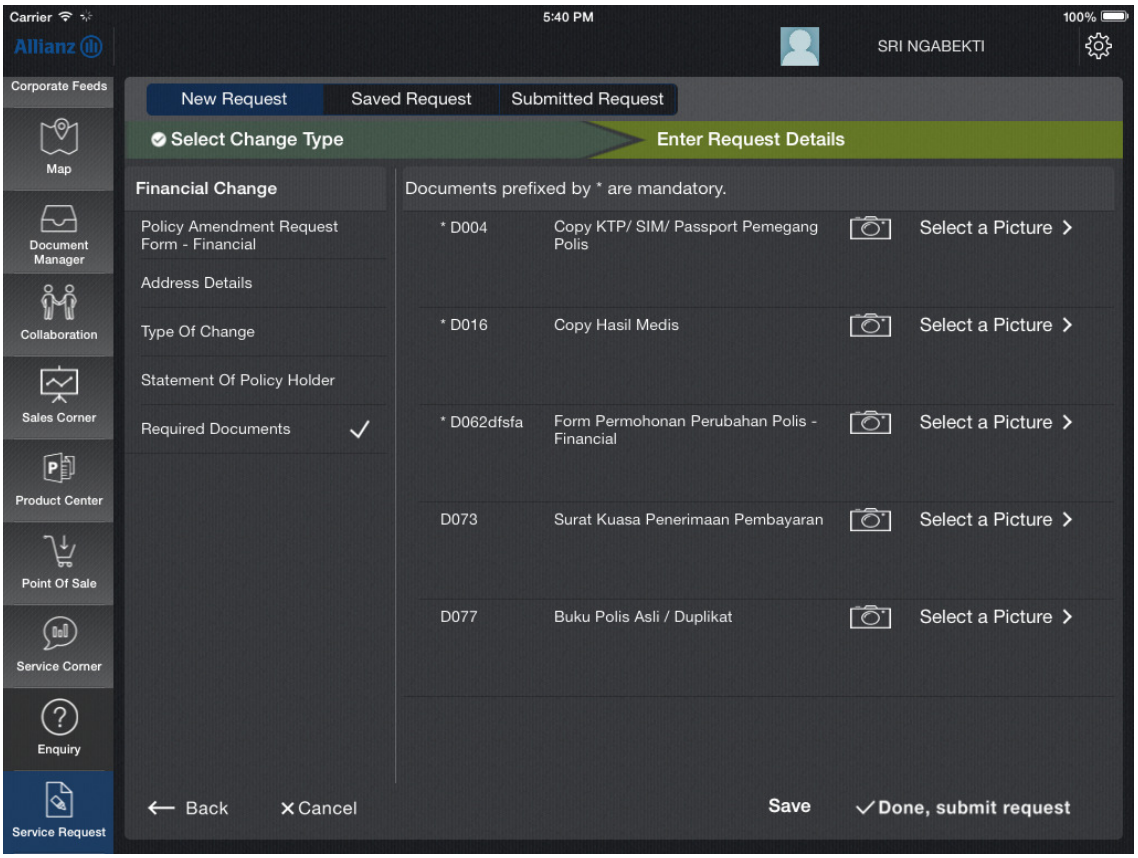

Figure1.42: required documents

7. User can save the form and make the changes later and submit. For saving, policy number is mandatory.

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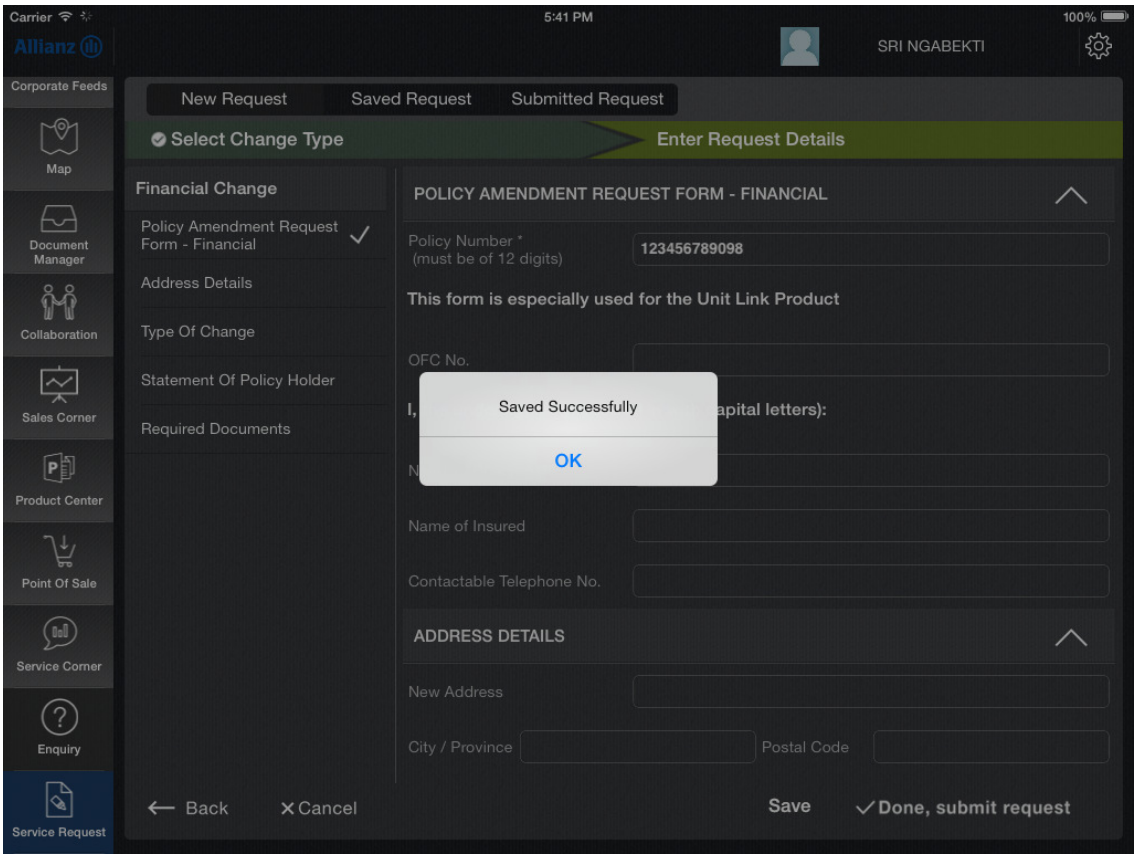

Figure1.43: saving request

8. User can also submit the form without saving also, on sucessful submission user will receive ticket number for that request.

9. User can view and edit saved request from the "Saved Request " tab.

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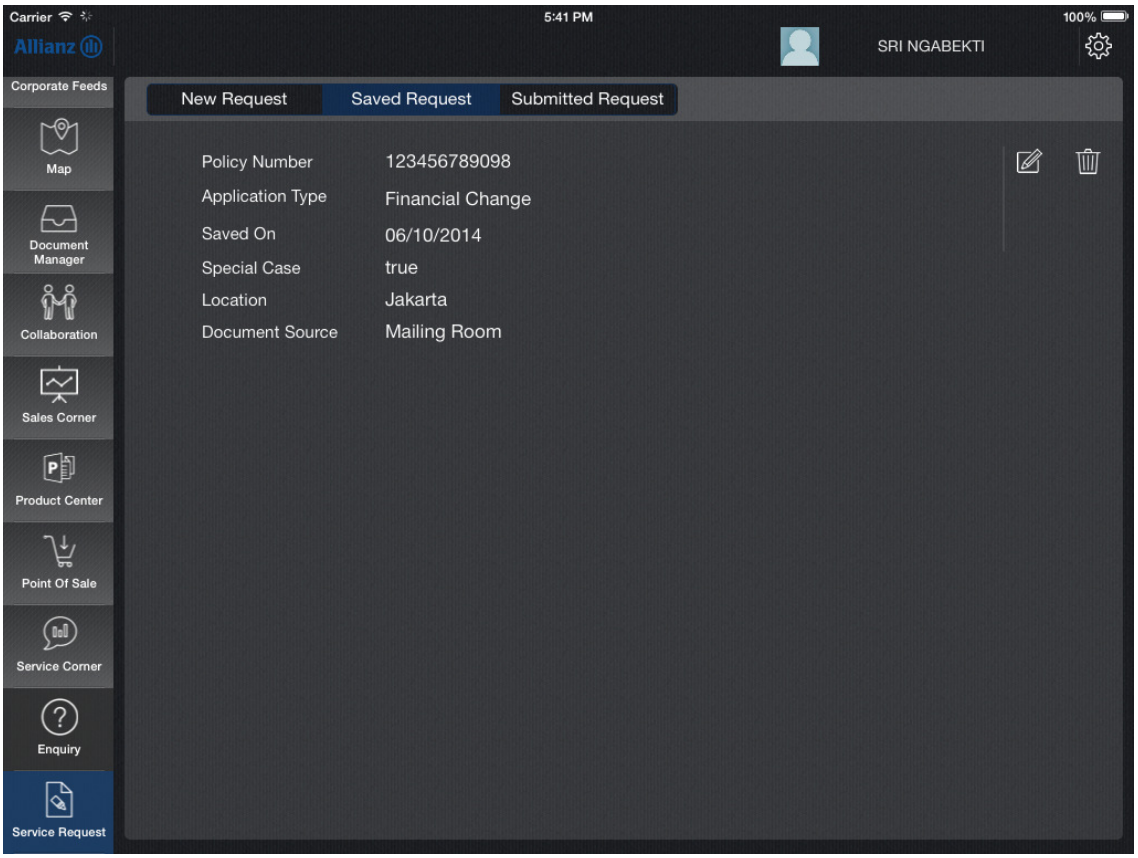

Figure1.44: view saved request

10. User can view submitted request from the "Submitted Request" tab.

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6. Point Of Sales (POS) Module

Point of sales Module is designed to understand the insurance requirements of customer and recommend product (s) that matches their requirements. The objective of this regulation is to ensure that the agent sells right product to the customer based on their actual need (s)-to prevent mis-selling of insurance products.User can access this module using following flow

6.1 Normal Flow

6.2 quick Flow

6.3 Saved and submitted

6.4 Document Upload

6.1 Normal Flow

Given below is the process that an ASN agent has to follow for the normal PoS.

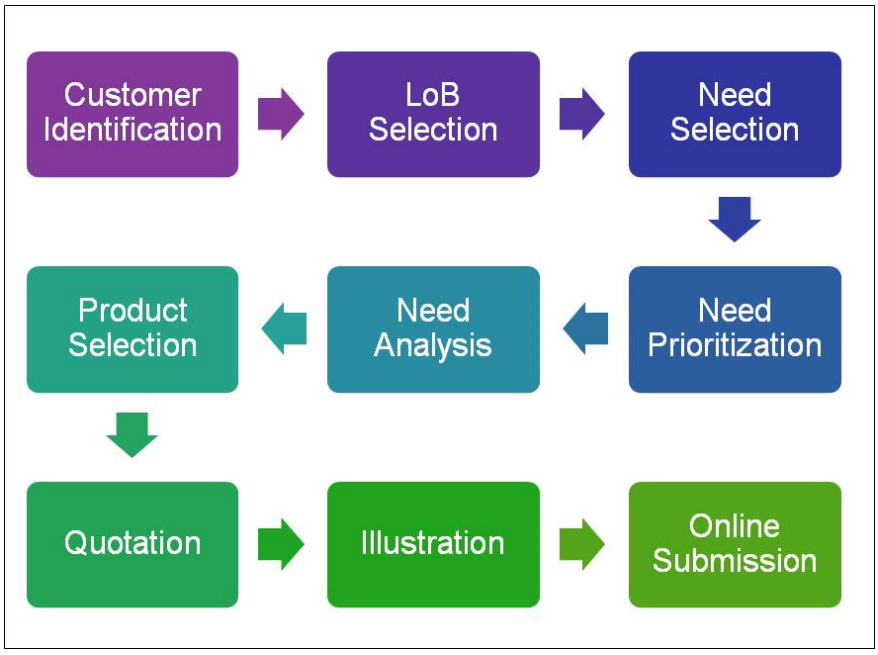

Figure1.45: POS Normal Flow

LoB Selection here refers to Type of Product Selection

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Navigation path for the module :

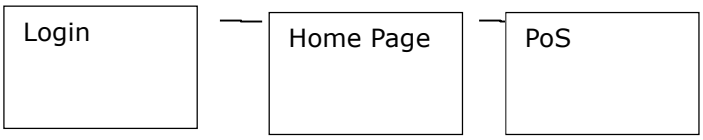

Figure1.46: POS Normal Flow

1. Lead Selection
2. Need Selection
3. Need Analysis
4. Product Selection
5. Product Comparision
6. Benefit Illustration
7. Illustation Generation
8. E-Submission

6.1.1 Lead Selection

This functionality enables the agent to select/identify he lead/prospect for which the need analysis has to be done.

1. Identify the Lead/Prospect
2. Select the Lead/Prospect
3. Search the Lead.Prospect
4. Display the Lead/Prospect Information
5. The indicative details to be displayed for Lead are: Customer ID, Lead ID, Lead Name, DoB, Sex, Hand phone Number, Email and Lead coordinate.Addres for Communication
6. he indicative details to be displayed for Prospects are: Name, ID type, ID Number, Address, Sex, Hand Phone Number, Email ID, Date of Birth, Age, Marital Status, and Occupation

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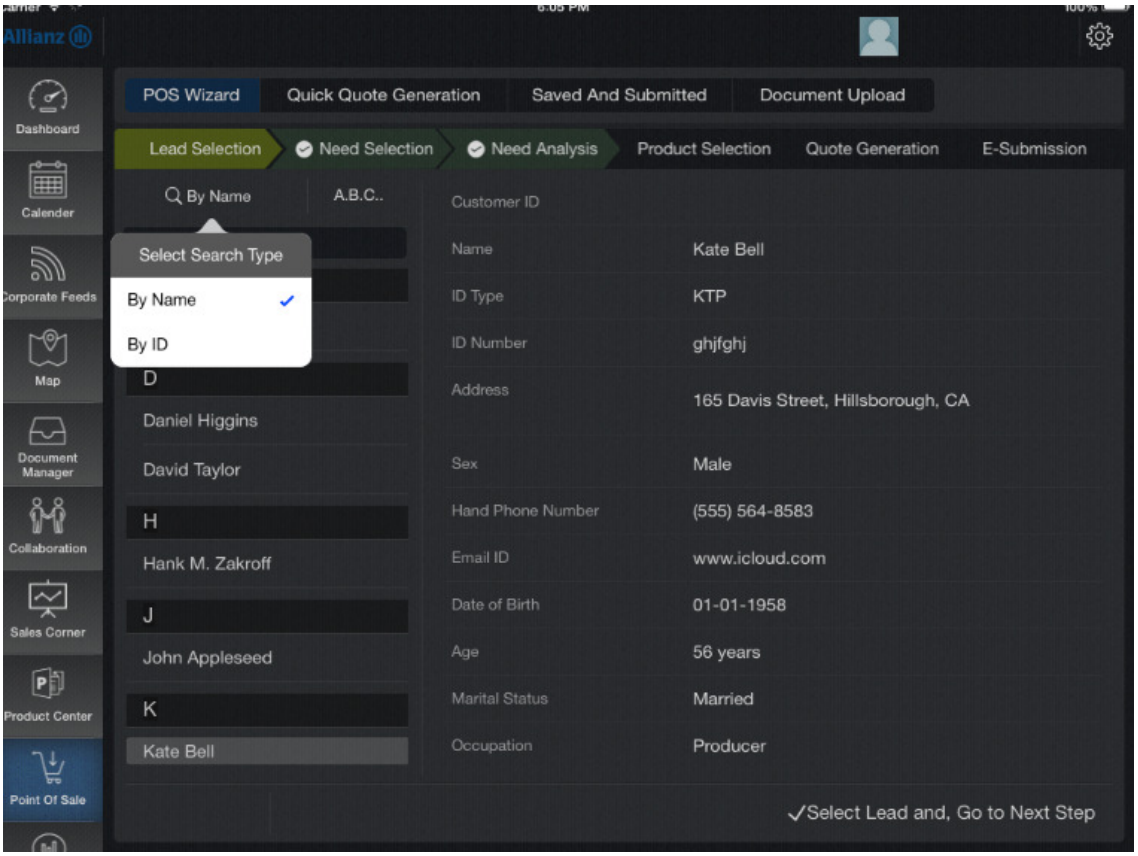

Figure1 .47 : Lead Selection Screen

6.1.2 Need Selection

This functionality enables the agent to select and priorities the customer needs.On need selection screen user should be able see the list of Type of Products

1. Life-Traditional
2. Life-Unit Linked
3. Health

User should be able to select one of the Type of Product. The screen would vary depending on the product selected from different Type of Products (Life Traditional, Life Unit Linked and Health)

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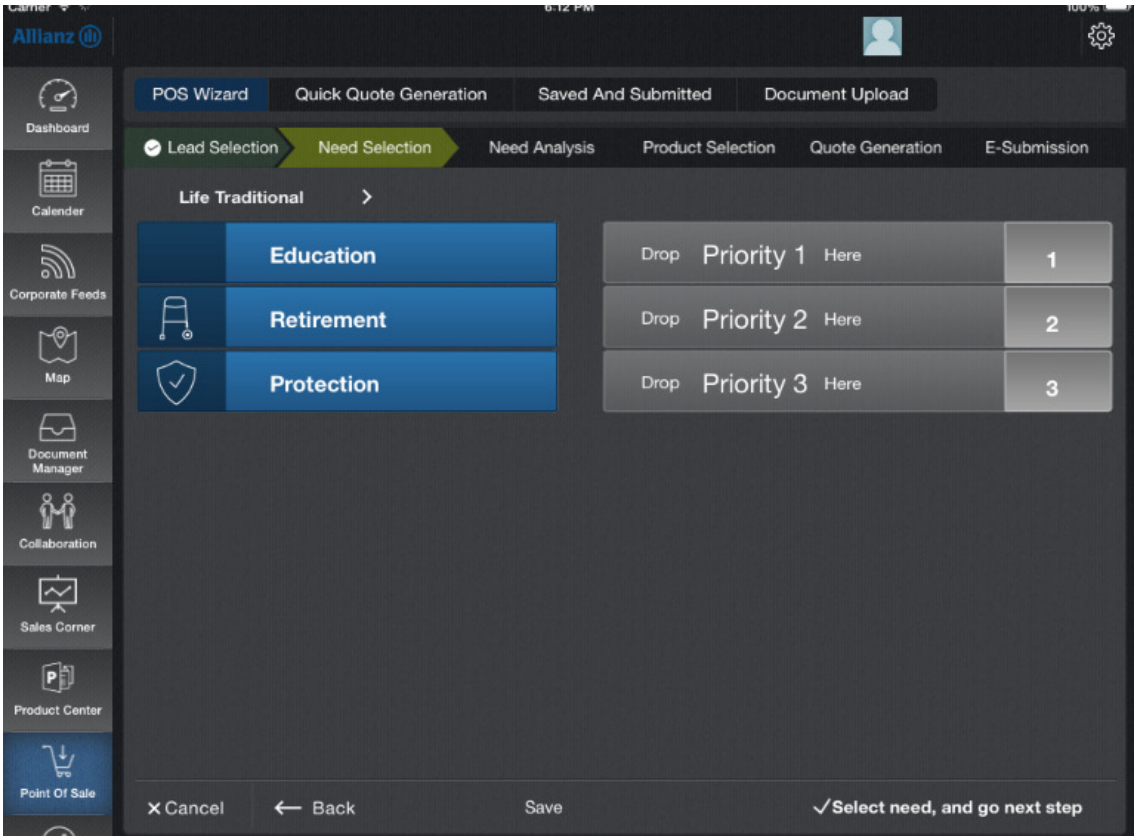

Figure 1.48 : Need Selection screen

6.1.3 Need Analysis

This functionality enables the agent to perform need analysis.The screen would vary depending on the product selected from different Type of Products (Life Traditional, Life Unit Linked and Health)

1.Details of at least one need are mandatory to proceed with this flow.

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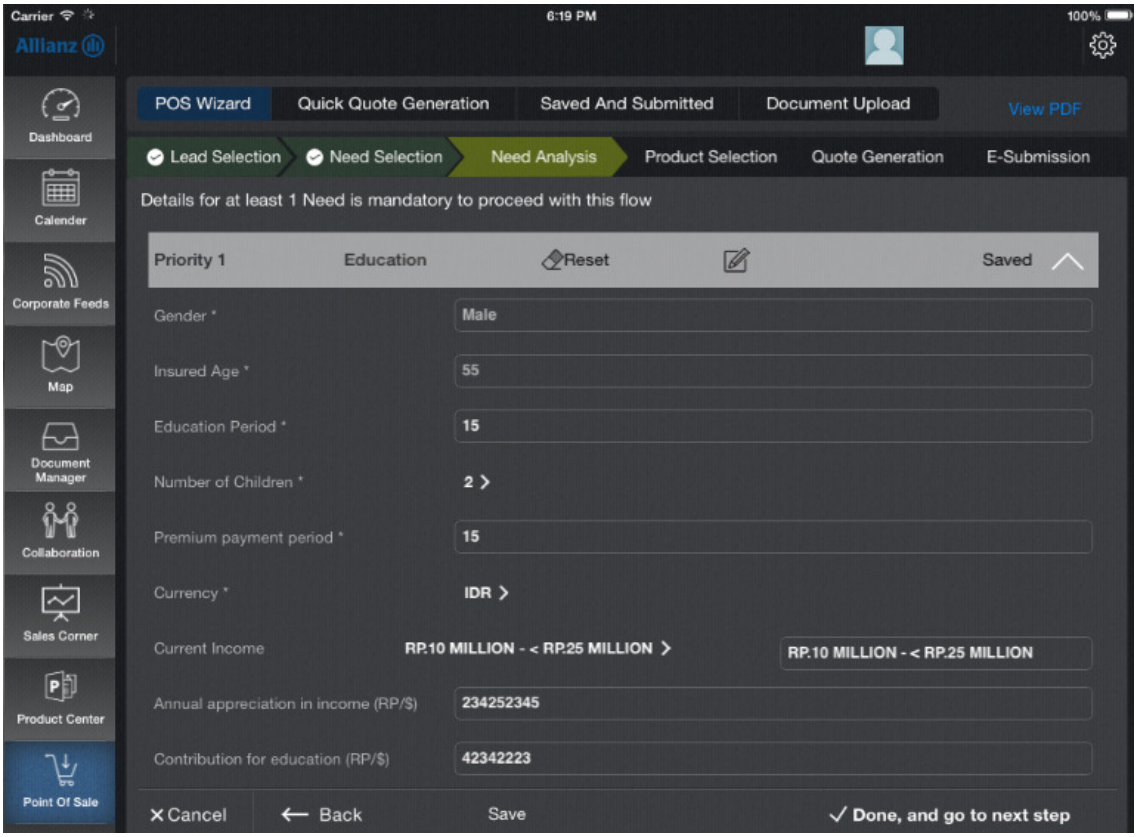

Figure 1.49 : Need Anaysis Screen

6.1.4 Product Selection

Product Selection enables the agent to view details for **Products (s)** that matches their need analysis.User can select product and riders.User can select one product and more than one rider from same product.The screen would vary depending on the product selected from different Type of Products (Life Traditional, Life Unit Linked and Health)

User should be able to perform the following at a product/rider level

2. View Product Info
3. Share Product Info
4. Download Product Info
5. Print Product Info
6. Search Products
7. Compare Products

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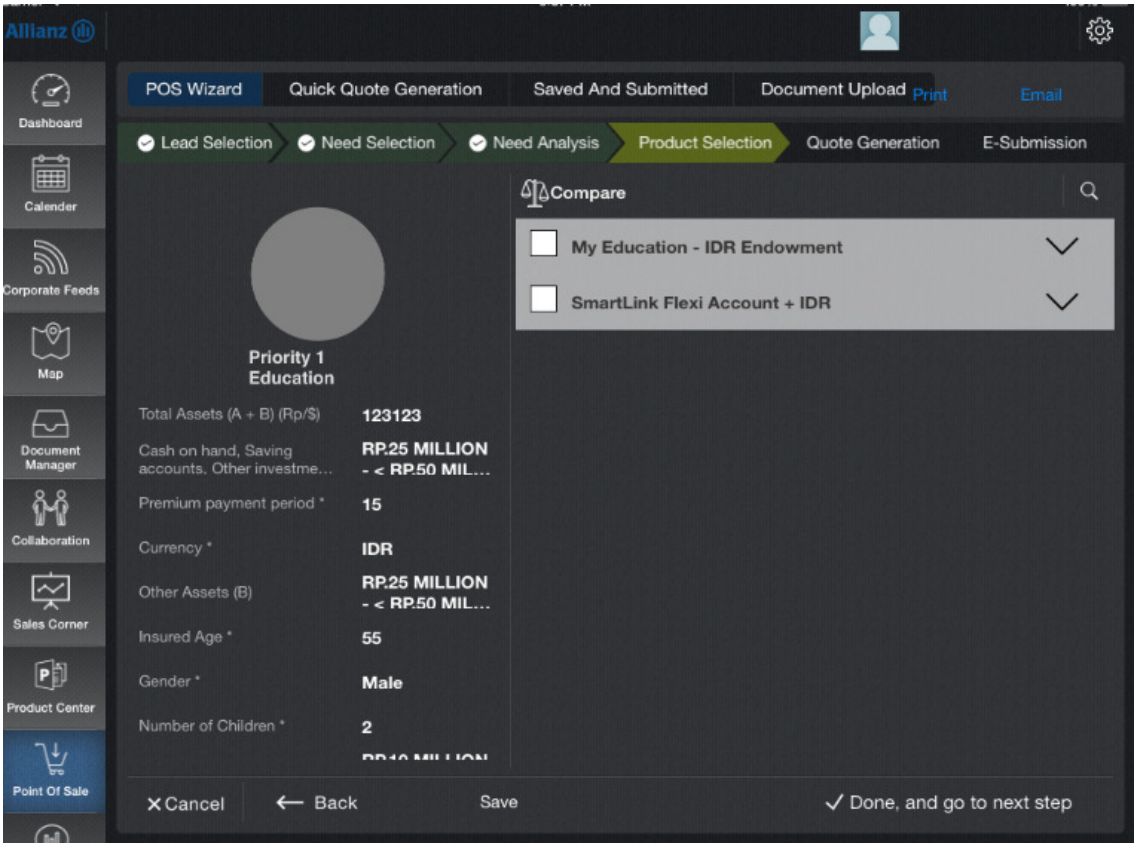

Figure 1.50 : Product selection Screen

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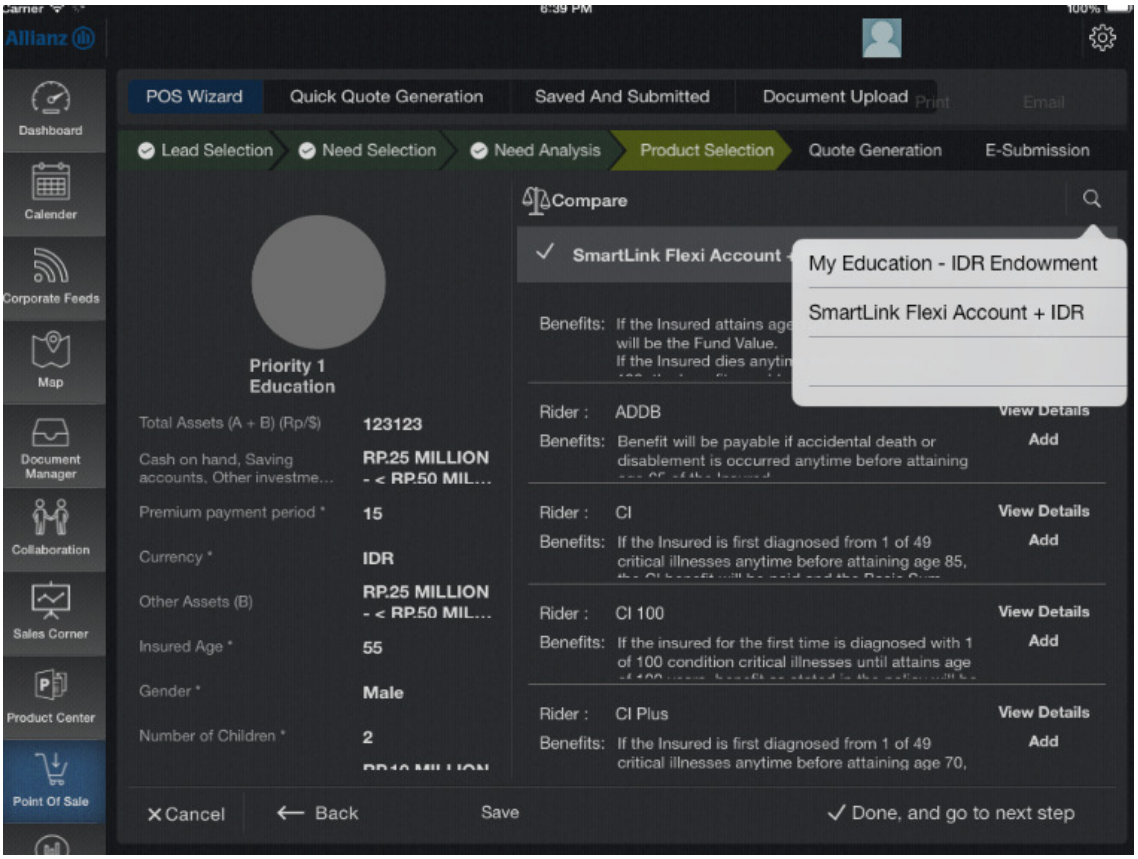

Figure 1.51: Product Search Screen

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6.1.5 Product Comparision

User can comapre two products. *Minimum 2 products to be selected for comparison.*

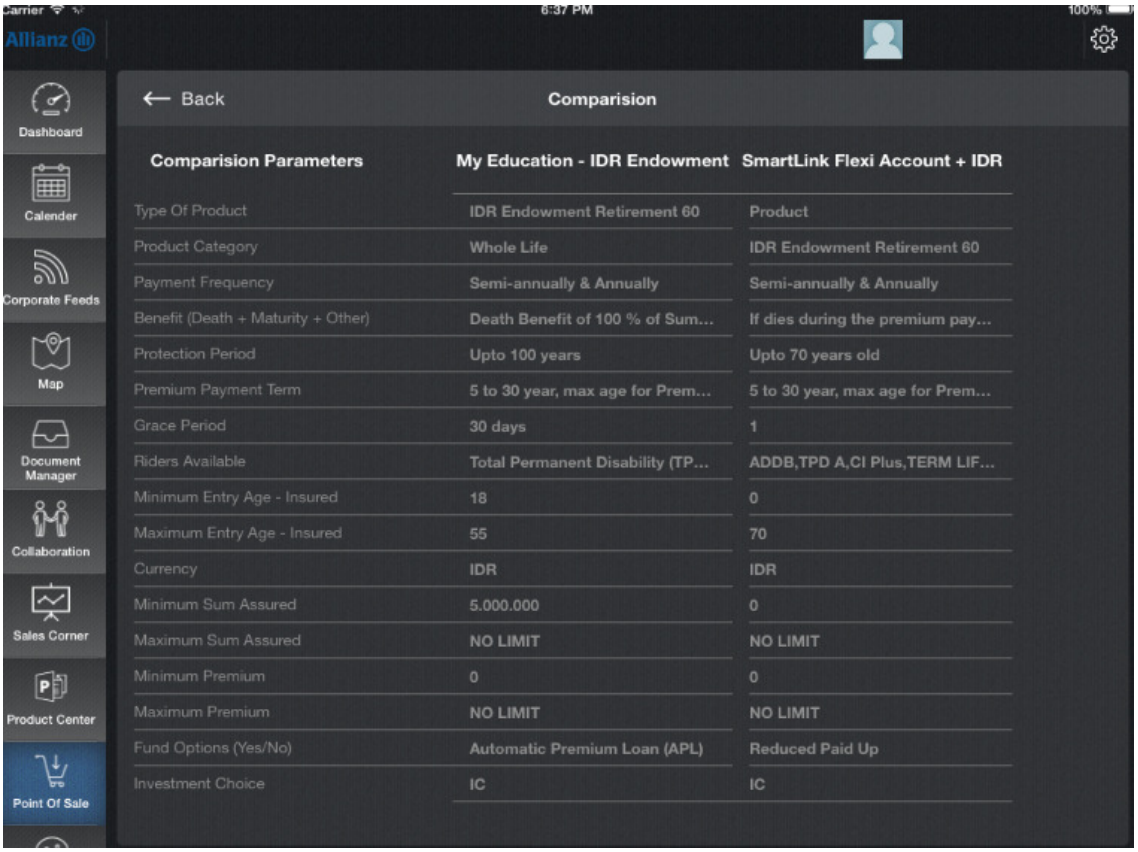

Figure 1.52 : Product Comarision Screen

6.1.6 Benefit Illustration

User is able to enter detailsrequired for illustration generation.Here, product detailscan be modified according to customer requirement.The screen would vary depending on the product selected from different Type of Products (Life Traditional, Life Unit Linked and Health).Agent can modify policyholder and can add family member, spouce,flexifamily member base on type of product and product selected

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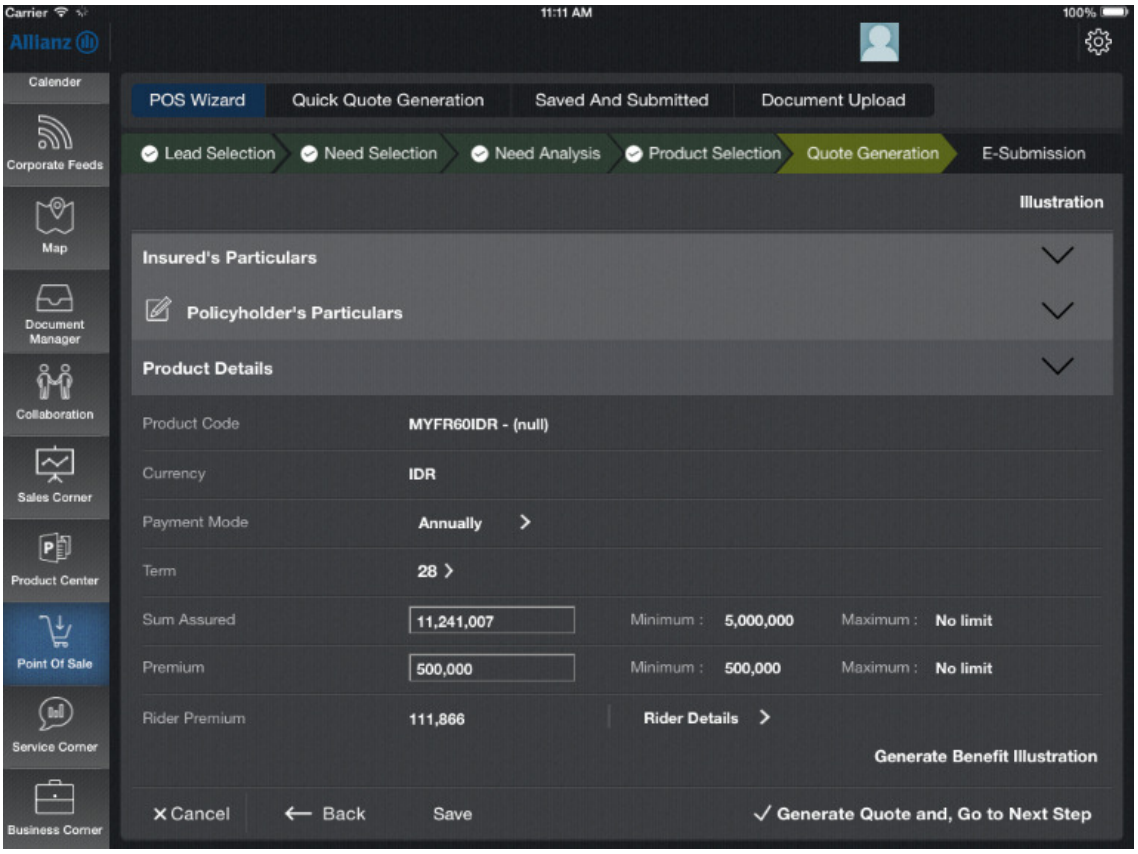

Figure 1.53: Benefit Illustration screen

6.1.7 Illustration Generation

Illustration generated based on the product selected.The screen would vary depending on the product selected from different Type of Products (Life Traditional, Life Unit Linked and Health)

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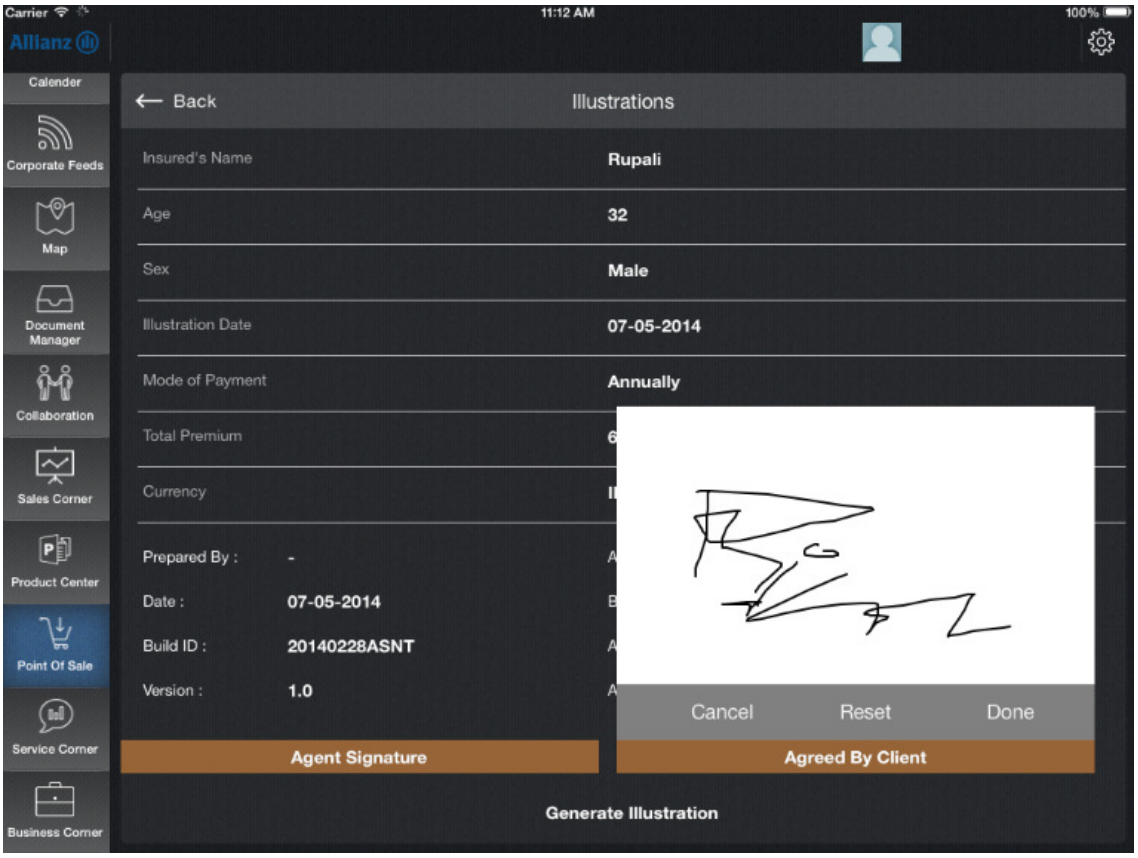

Figure 1.54 : Illustration generation screen

6.1.8 E-Submission

This screen will provide the different form based on the product selected and provide following functionality to user.

1. To capture application data and image of documentary evidences
2. To save application details
3. To submit the application
4. To check validity of the documentary evidences
5. To access saved and submitted applications

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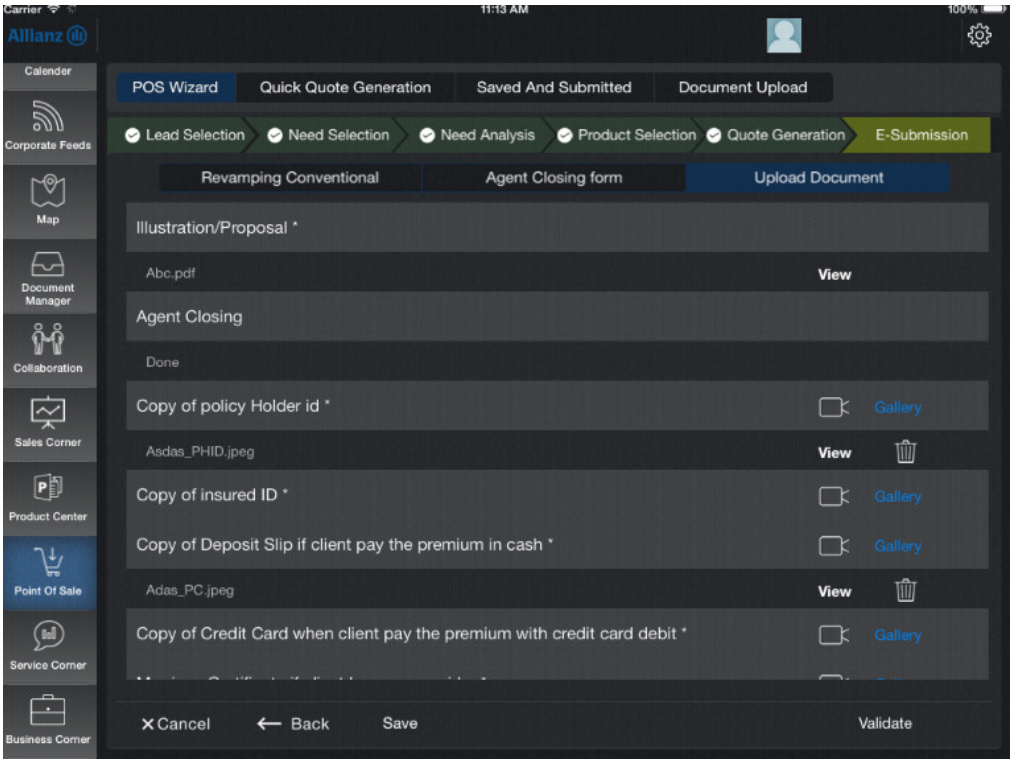
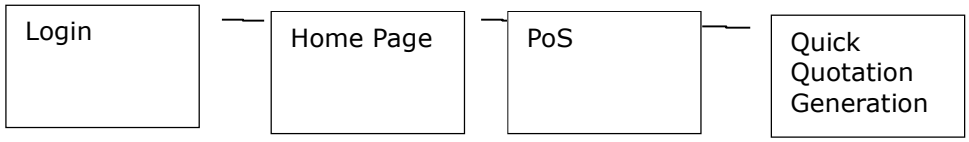


Figure 1.55: E-Submission screen

6.2 Quick Flow

Navigation path for the module:



1. Lead Selection
2. Add Details
3. Product Selection
4. Product Comparision
5. Benefit Illustration
6. Illustation Generation

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7. E-Submission

6.2.1 Lead Selection

This functionality enables the agent to select/identify he lead/prospect for which the need analysis has to be done.

7. Identify the Lead/Prospect
8. Select the Lead/Prospect
9. Search the Lead.Prospect
10. Display the Lead/Prospect Information
11. The indicative details to be displayed for Lead are: Customer ID, Lead ID, Lead Name, DoB, Sex, Hand phone Number, Email and Lead coordinate.Addres for Communication
12. he indicative details to be displayed for Prospects are: Name, ID type, ID Number, Address, Sex, Hand Phone Number, Email ID, Date of Birth, Age, Marital Status, and Occupation

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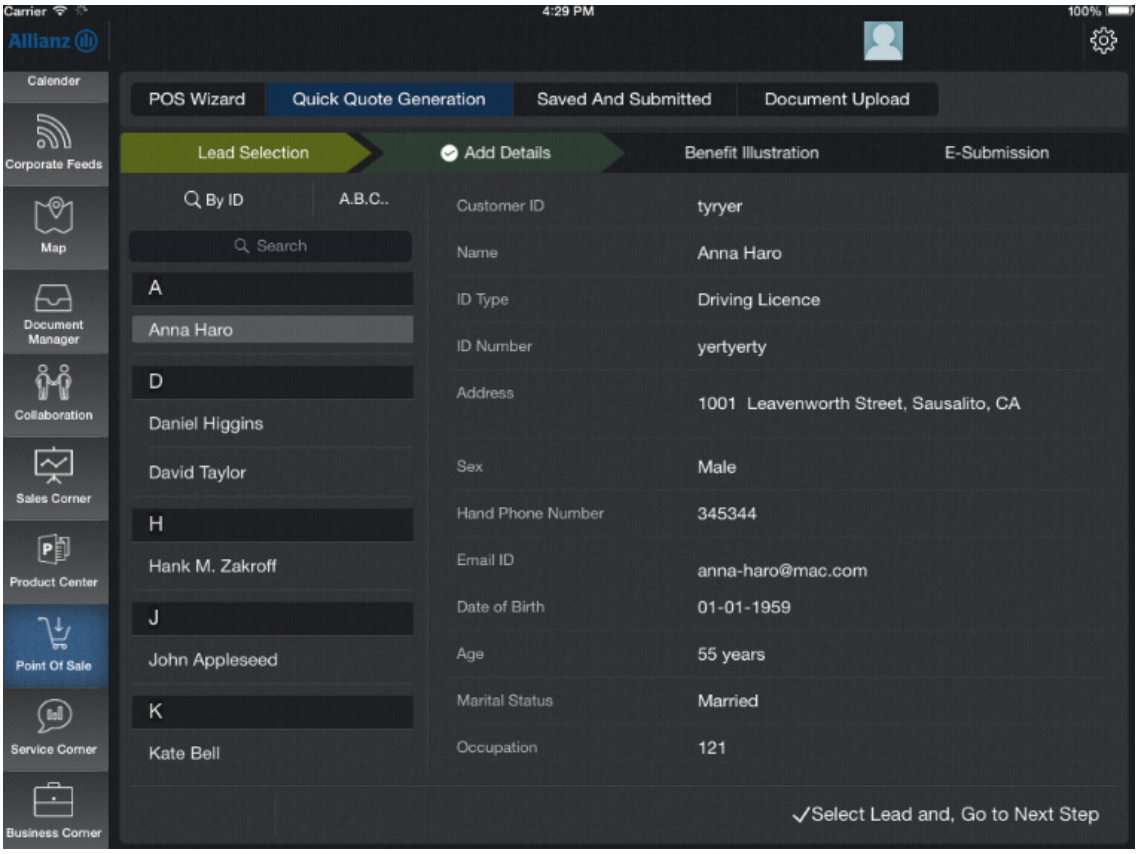

Figure 1.56 : Lead Selection Screen

6.2.2 Add Details

This functionality enables the agent to select product without any need selection and analysis

- On add details screen user should be able see the list of Type of Products
- Life-Traditional
- Life-Unit Linked

4. Health

User should be able to select one of the Type of Product. The screen would vary depending on the product selected from different Type of Products (Life Traditional, Life Unit Linked and Health) Those products belonging to particular product type appear on the screen. User is able to select product and riders.

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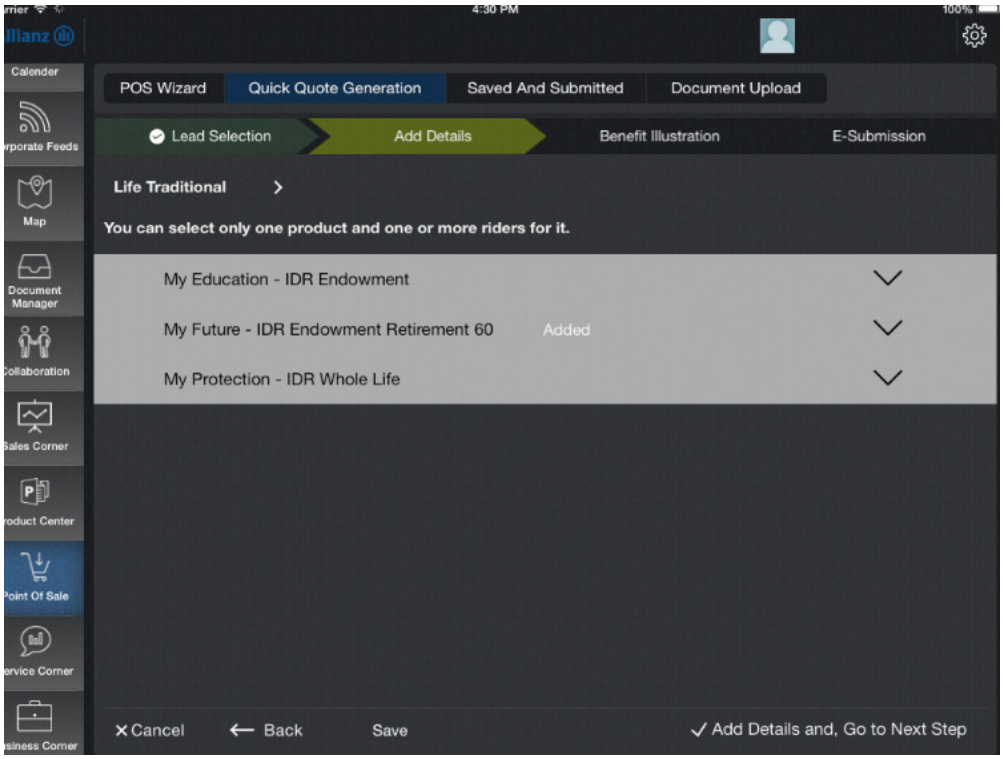

Figure 1.57 : E-Submission screen

6.2.3 Benefit Illustration

User is able to enter details required for illustration generation.Here, product detailscan be modified according to customer requirement.The screen would vary depending on the product selected from different Type of Products (Life Traditional, Life Unit Linked and Health).Agent can modify policyholder and can add family member, spouce,flexifamily member base on type of product and product selected

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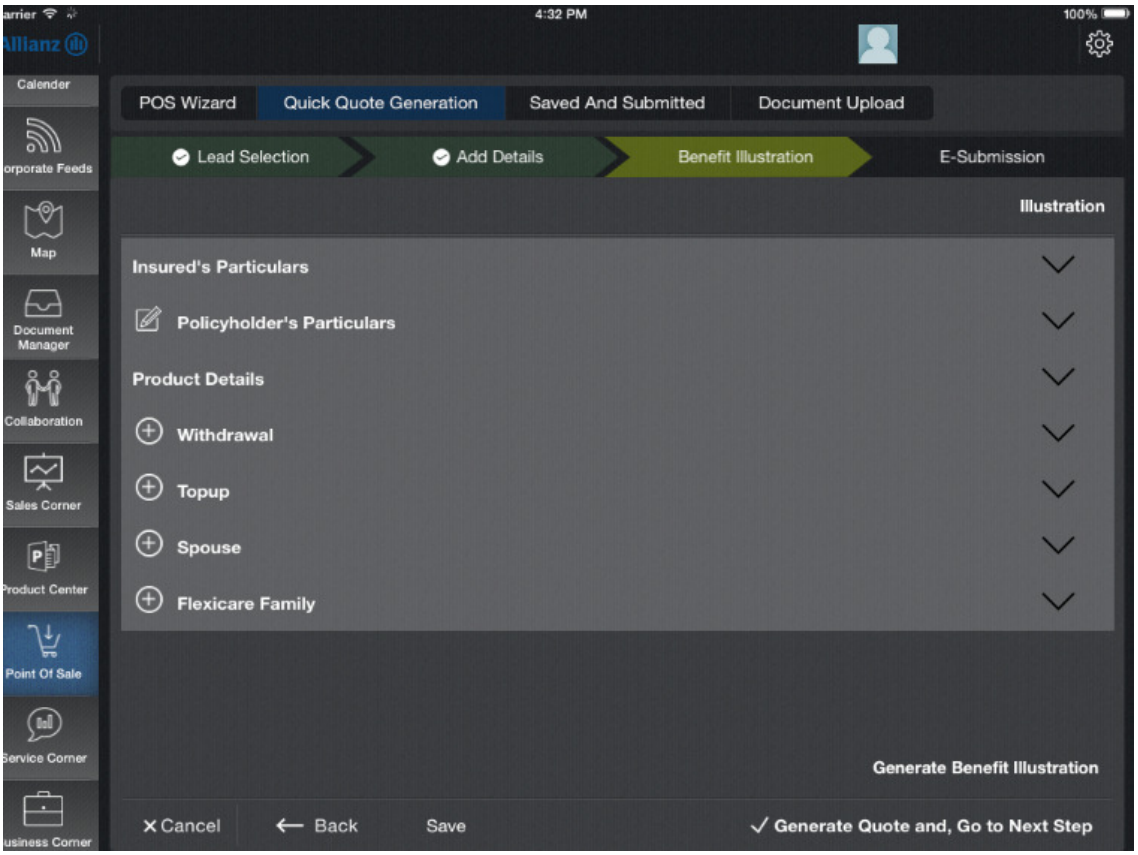

Figure 1.58: Benefit Illustration screen

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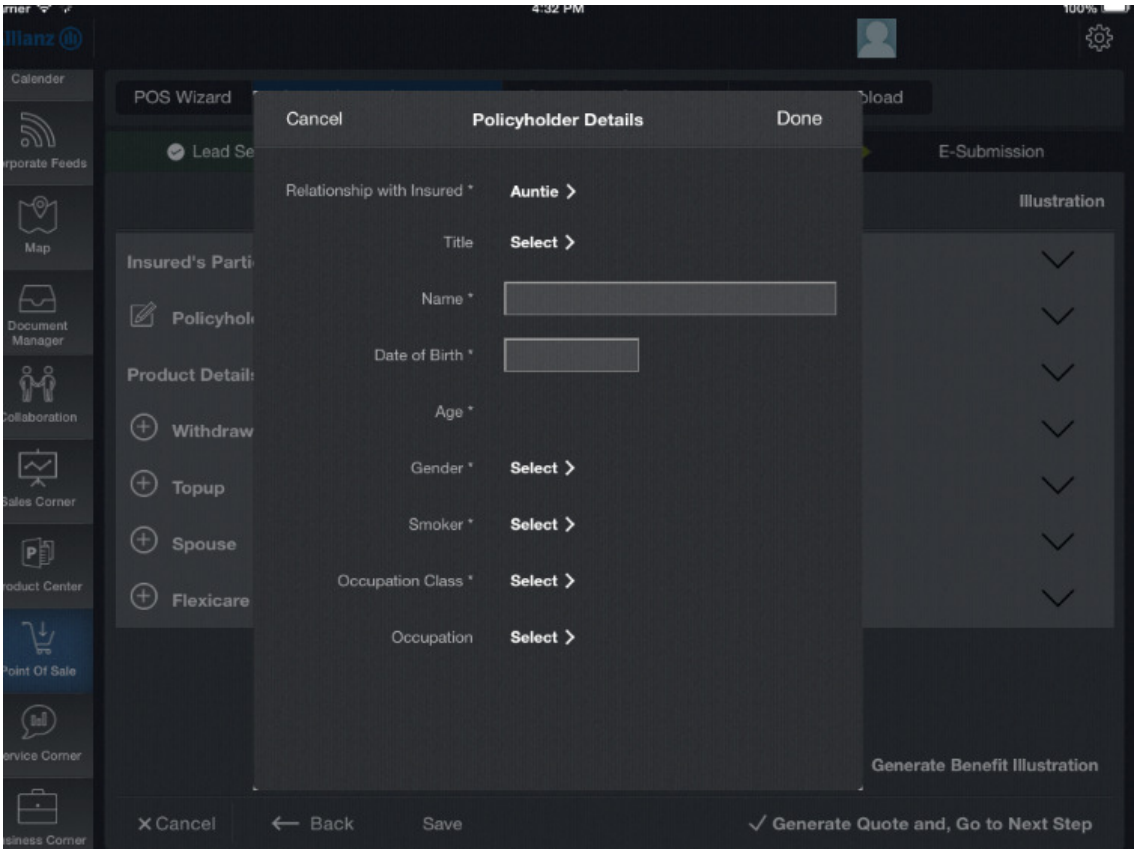

Figure 1.59 : PolicyHolder details screen

6.2.4 Illustration Generation

Illustration generated based on the product selected.The screen would vary depending on the product selected from different Type of Products (Life Traditional, Life Unit Linked and Health)

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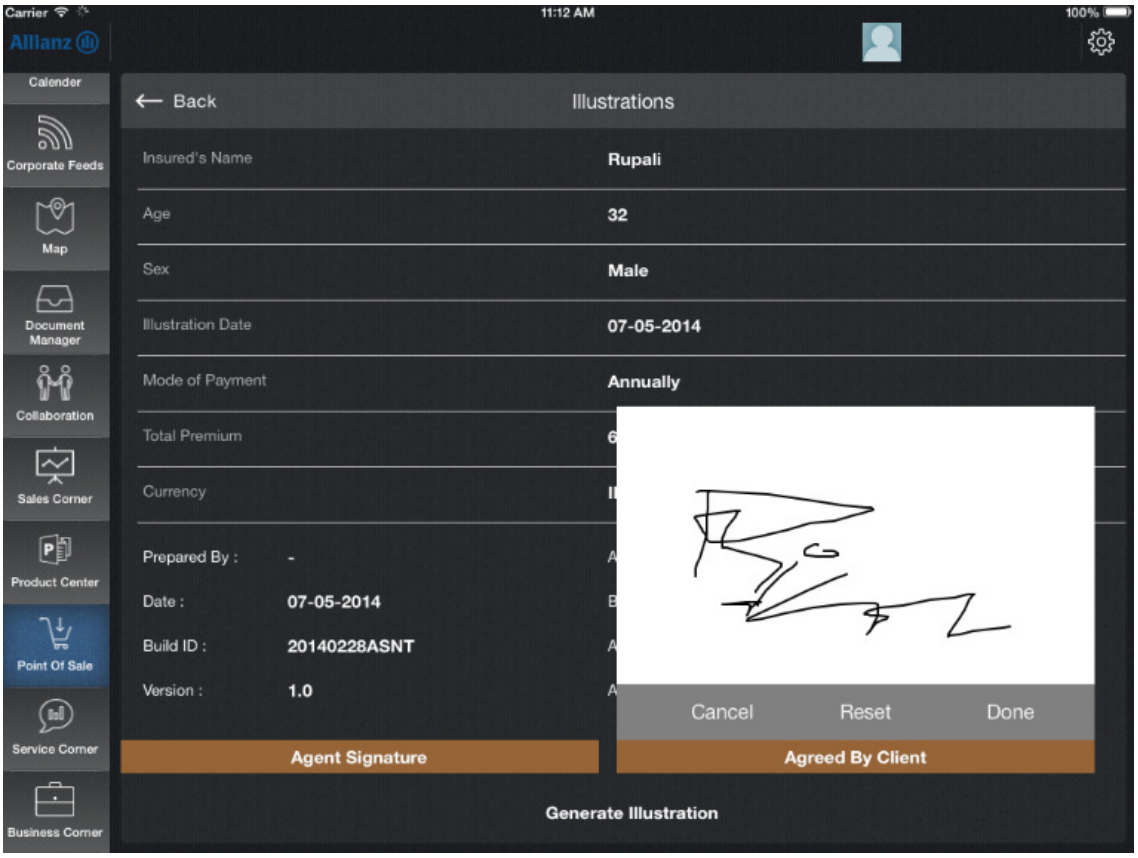

Figure 1.60 : Illustration generation screen

6.2.5 E-submission

This screen will provide the different form based on the product selected and provide following functionality to user.

1. To capture application data and image of documentary evidences
2. To save application details
3. To submit the application
4. To check validity of the documentary evidences
5. To access saved and submitted applications

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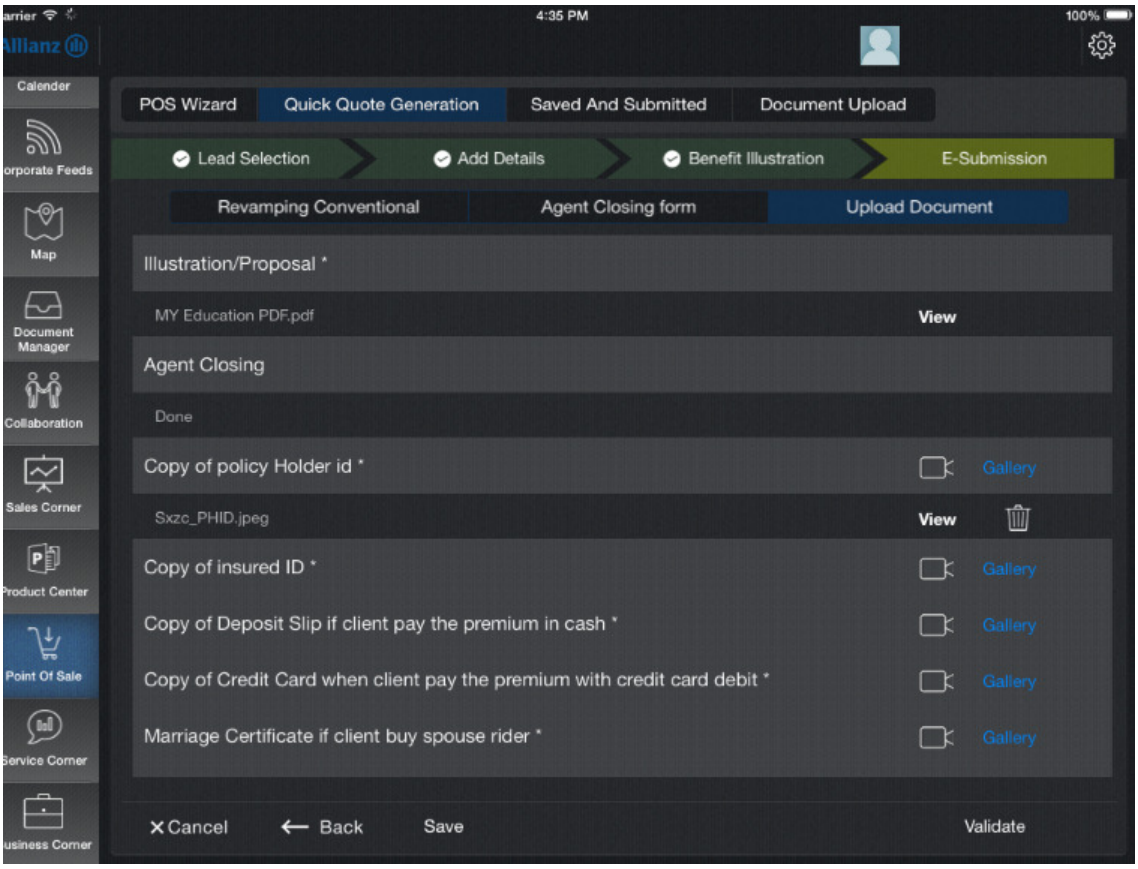

Figure 1.61: E-Submission screen

6.3 Saved and Submitted

AMIT TODO

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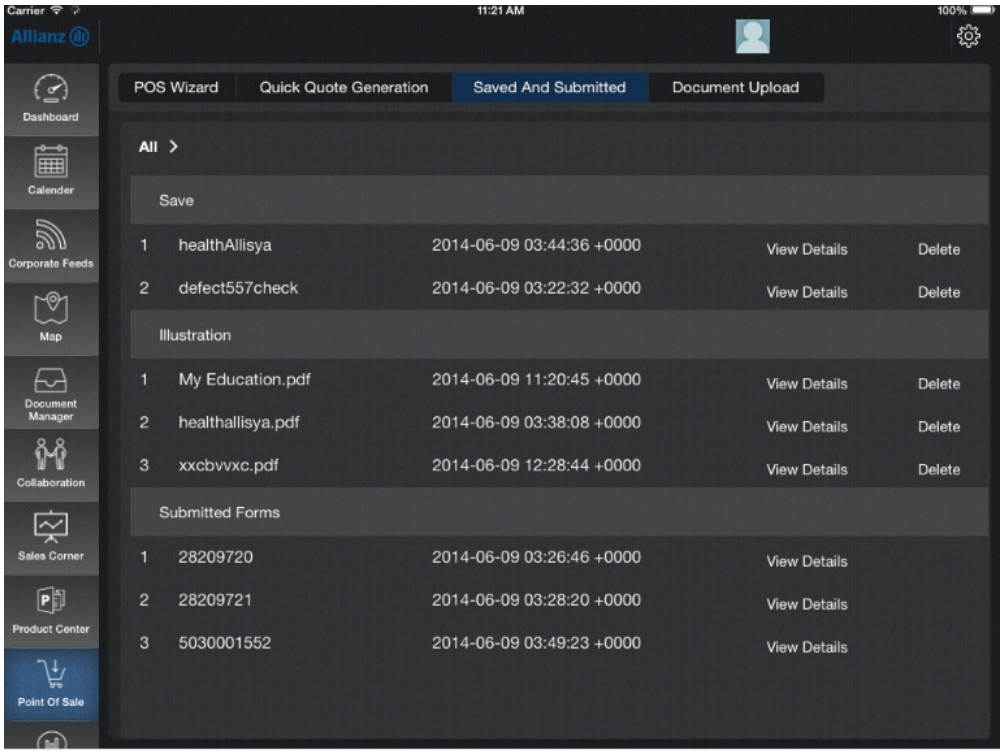

Figure 1.62 : saved and Submitted screen

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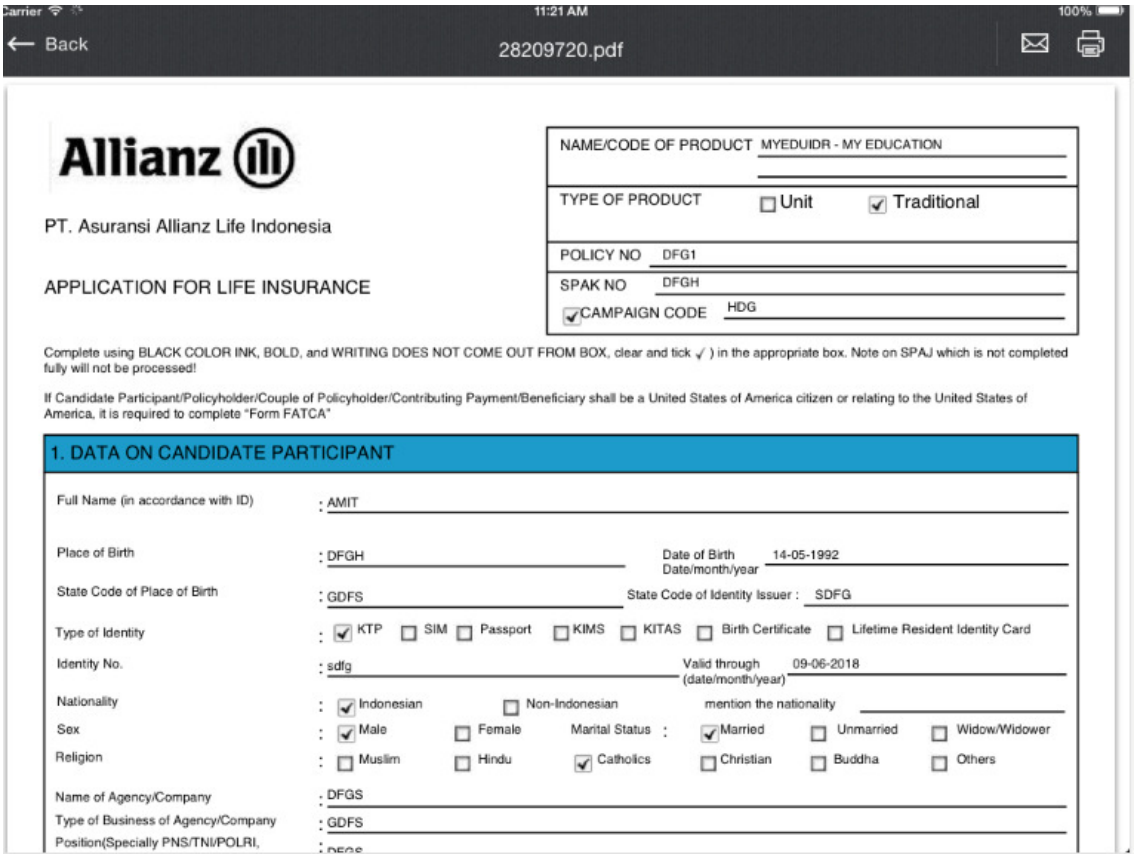
Carrier
11:21 AM
100%
Back
28209720.pdf
Allianz
PT. Asuransi Allianz Life Indonesia
APPLICATION FOR LIFE INSURANCE
NAME/CODE OF PRODUCT MYEDUIDR - MY EDUCATION
TYPE OF PRODUCT Unit Traditional
POLICY NO DFG1
SPAK NO DFGH
CAMPAIGN CODE HDG
Complete using BLACK COLOR INK, BOLD, and WRITING DOES NOT COME OUT FROM BOX, clear and tick √) in the appropriate box. Note on SPAJ which is not completed fully will not be processed!
If Candidate Participant/Policyholder/Couple of Policyholder/Contributing Payment/Beneficiary shall be a United States of America citizen or relating to the United States of America, it is required to complete "Form FATCA"
1. DATA ON CANDIDATE PARTICIPANT
Full Name (in accordance with ID) : AMIT
Place of Birth : DFGH
Date of Birth Date/month/year 14-05-1992
State Code of Place of Birth : GDFS
State Code of Identity Issuer : SDFG
Type of Identity : KTP SIM Passport KIMS KITAS Birth Certificate Lifetime Resident Identity Card
Identity No. : sdfg
Valid through (date/month/year) 09-06-2018
Nationality : Indonesian Non-Indonesian mention the nationality
Sex : Male Female Marital Status : Married Unmarried Widow/Widower
Religion : Muslim Hindu Catholics Christian Buddha Others
Name of Agency/Company : DFGS
Type of Business of Agency/Company : GDFS
Position(Specially PNS/TNI/POLRI, : DFGS

Figure 1.63: SPAJ form screen

6.4 Document upload

AMIT TODO

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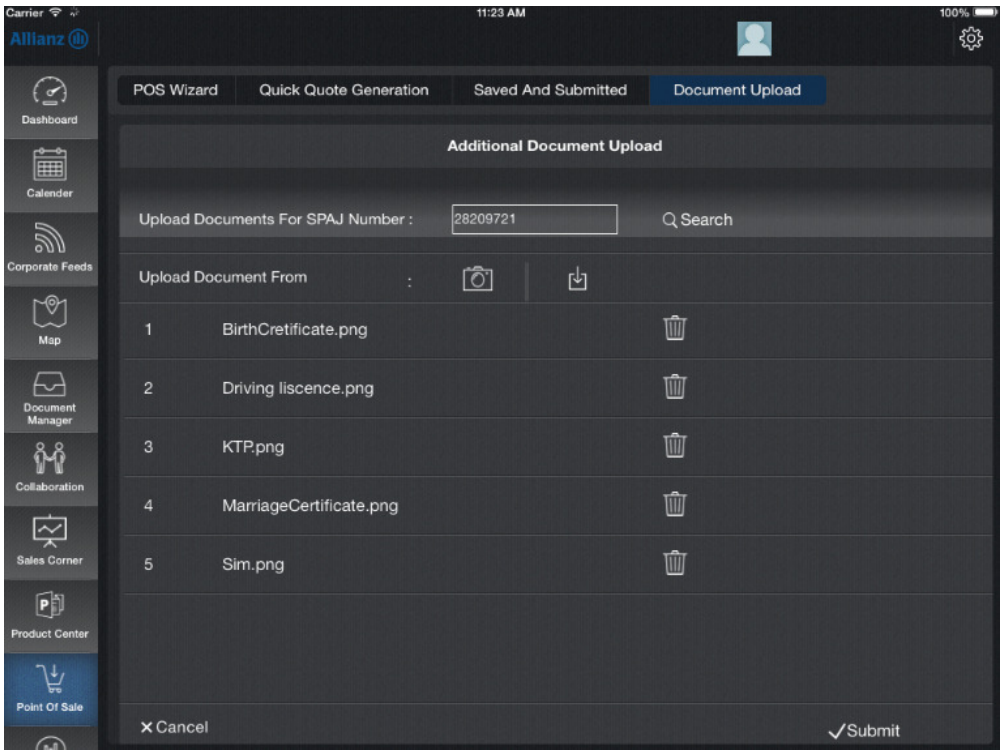

Figure 1.64: Document Upload screen

7. Business Corner

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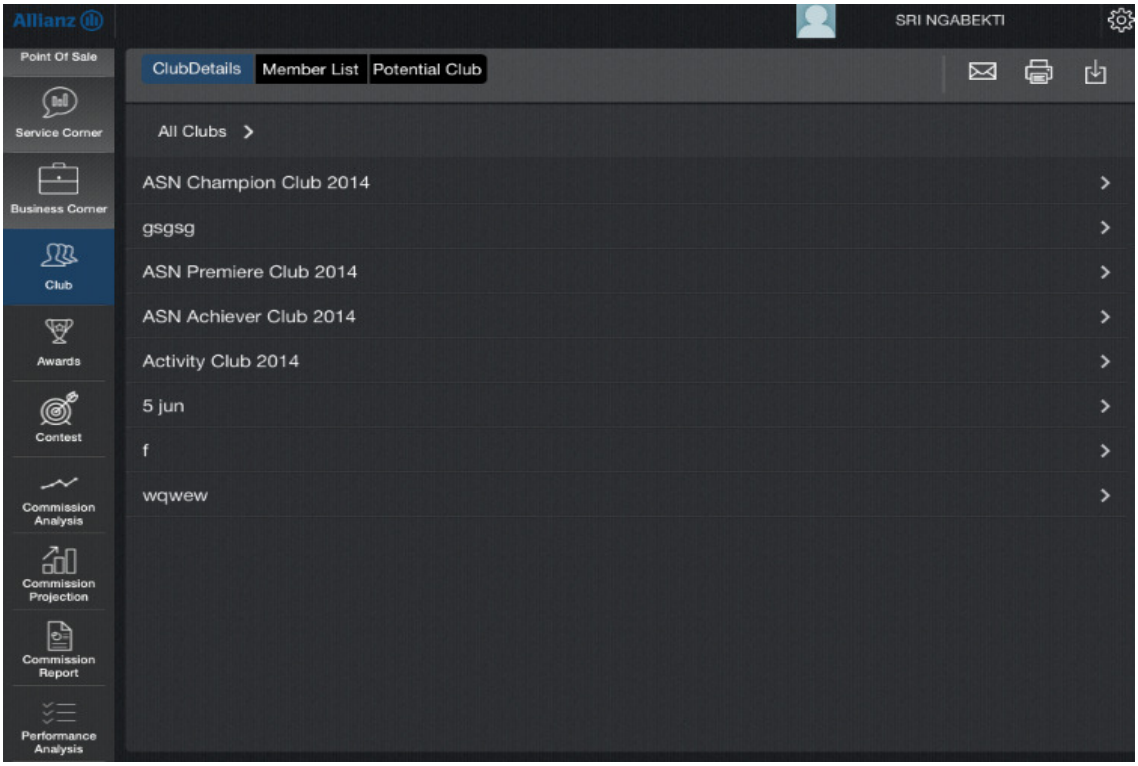
Business Corner module consists of following sub modules:

1. Clubs
2. Awards
3. Contest
4. Commission Analysis
5. Commission Report
6. Commission Projection
7. Performance Analysis

7.1 Clubs

ASN Agents are grouped and enrolled into different privileged member groups called as Clubs.

7.1.1 Club Details



1. Agent can view list of all the clubs.

Figure 1.65 - List of Clubs screen

2. Agent can filter the clubs based on club type.

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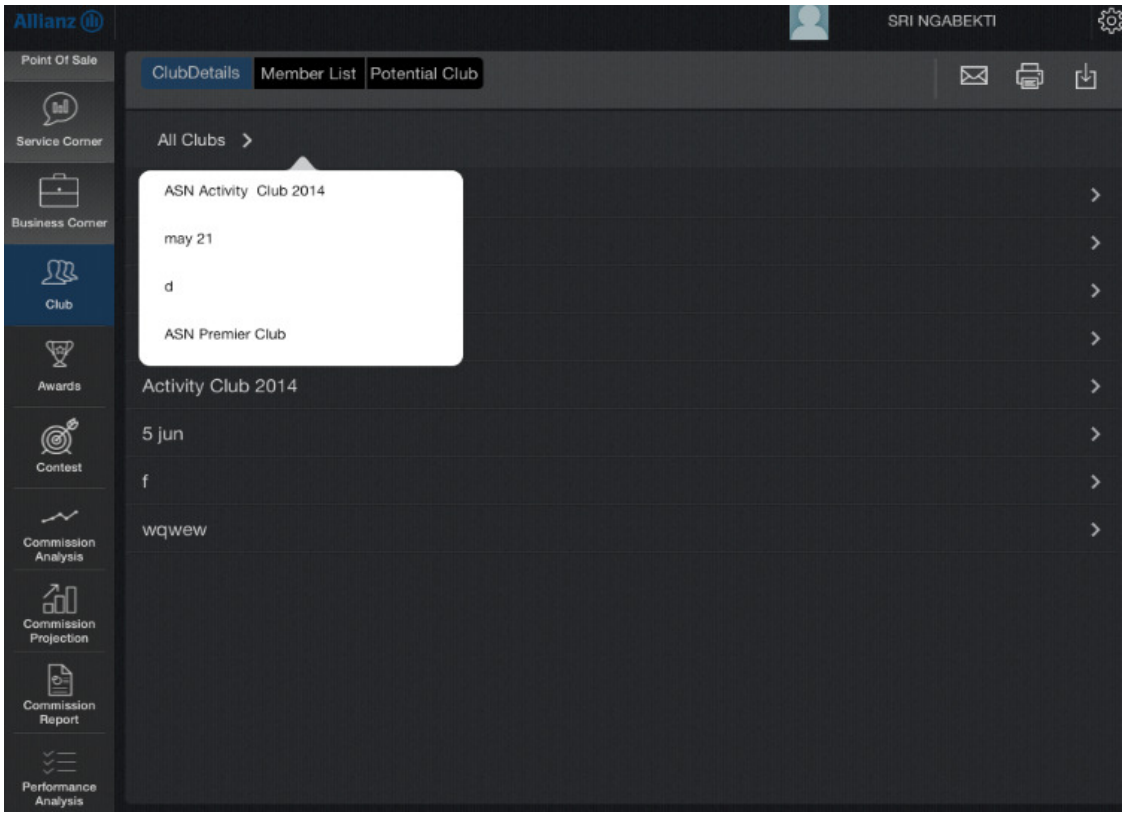

Figure 1.66 - **List of club types screen.**

7. Click on the club and select a particular applicability level to view Club details for the selected parameter.

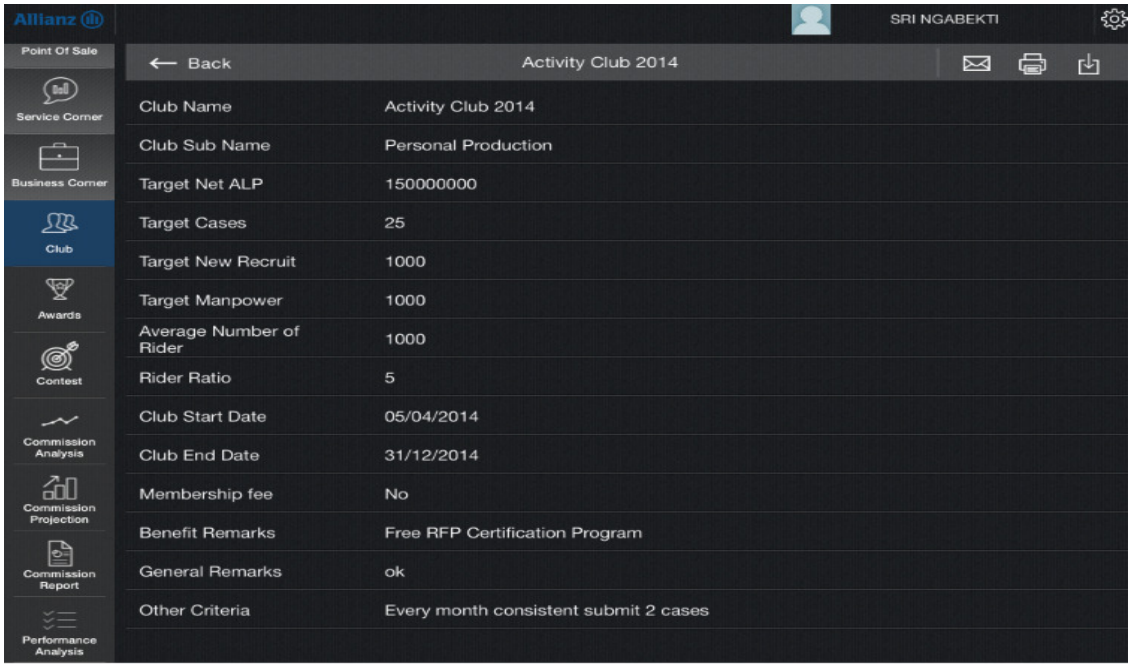

Figure 1.65 - **Club details screen**

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7.1.2 Member List

1. Tap on MemberList tab to view the list of members for default club i.e: ASN Champion Club.

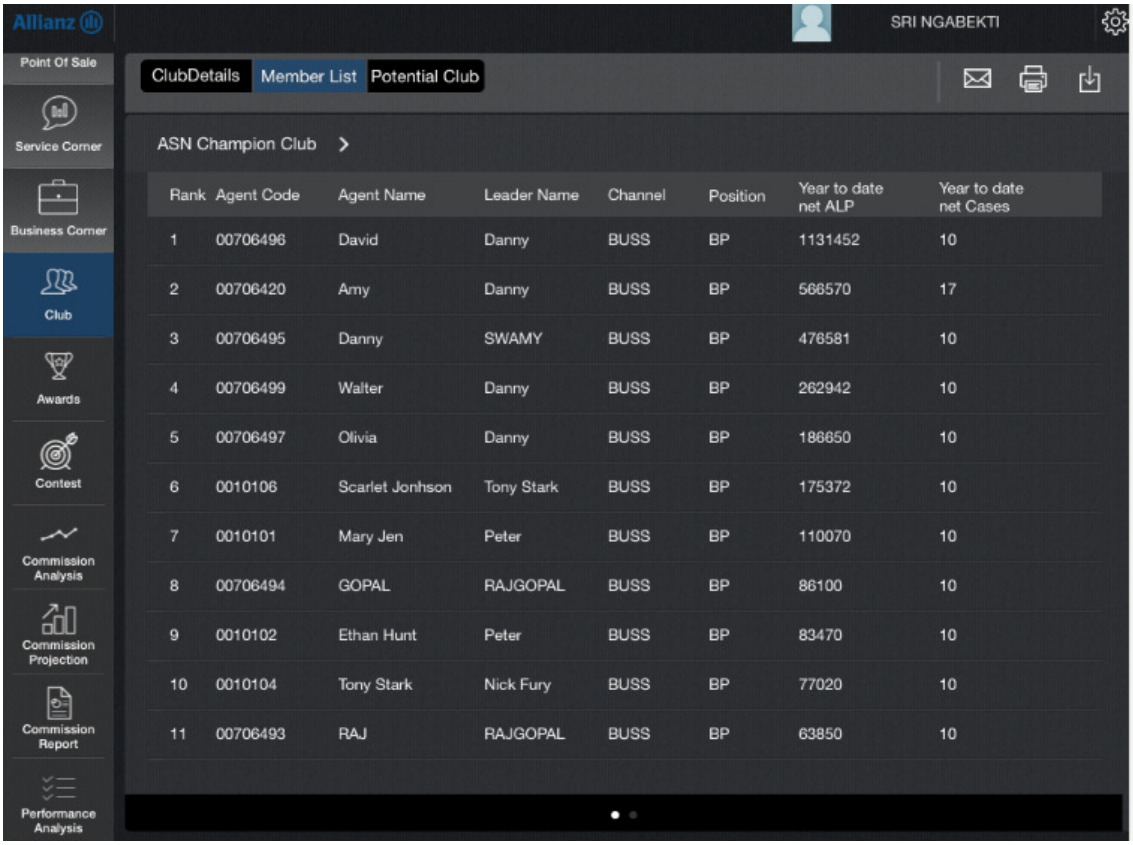
Allianz
SRI NGABEKTI
Point Of Sale
Service Corner
Business Corner
Club
Awards
Contest
Commission Analysis
Commission Projection
Commission Report
Performance Analysis
ClubDetails
Member List
Potential Club
ASN Champion Club
Rank Agent Code Agent Name Leader Name Channel Position Year to date net ALP Year to date net Cases
1 00706496 David Danny BUSS BP 1131452 10
2 00706420 Amy Danny BUSS BP 566570 17
3 00706495 Danny SWAMY BUSS BP 476581 10
4 00706499 Walter Danny BUSS BP 262942 10
5 00706497 Olivia Danny BUSS BP 186650 10
6 0010106 Scarlet Jonhson Tony Stark BUSS BP 175372 10
7 0010101 Mary Jen Peter BUSS BP 110070 10
8 00706494 GOPAL RAJGOPAL BUSS BP 86100 10
9 0010102 Ethan Hunt Peter BUSS BP 83470 10
10 0010104 Tony Stark Nick Fury BUSS BP 77020 10
11 00706493 RAJ RAJGOPAL BUSS BP 63850 10

Figure 1.67 **Default Club MemberList screen**

1. Agent can view the list of members for different clubs

2.1 Tap on club type button and select a club type and view the list of club names for selected club type.

2.2 Select club name and view the list of applicability level for that club.

2.3 Select applicability level and view the list of members for the selected parameter.

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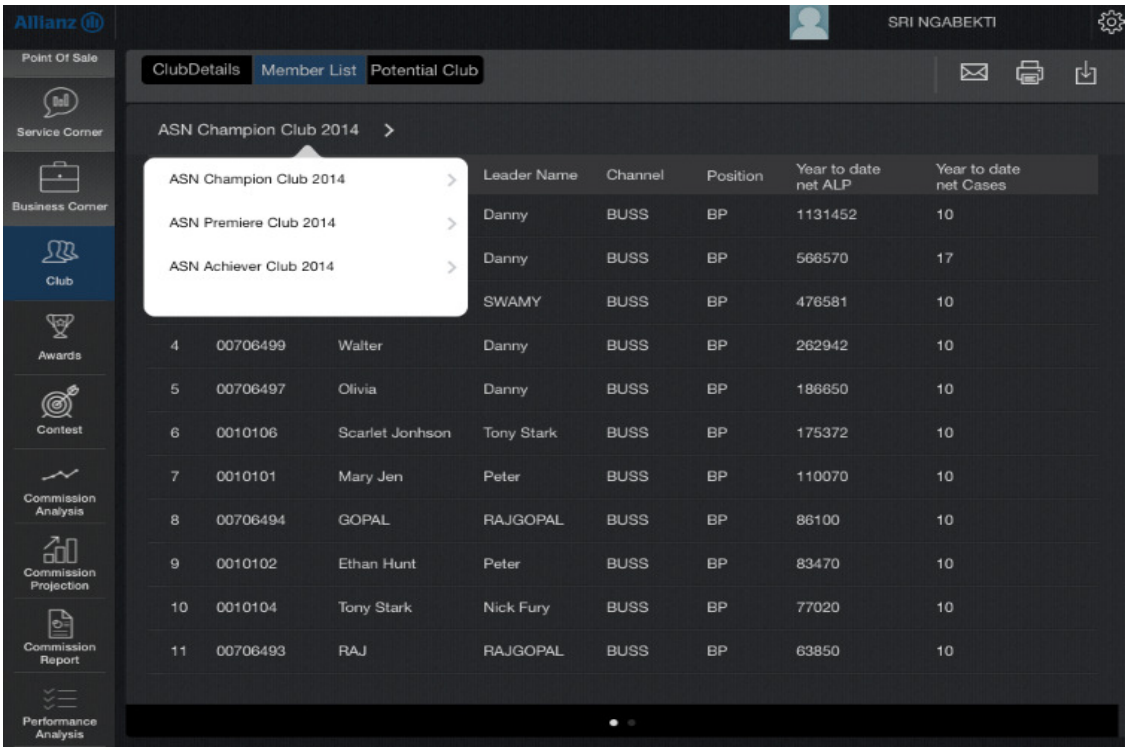
Allianz
SRI NGABEKTI
Point Of Sale
Service Corner
Business Corner
Club
Awards
Contest
Commission Analysis
Commission Projection
Commission Report
Performance Analysis
ClubDetails
Member List
Potential Club
ASN Champion Club 2014
ASN Champion Club 2014
ASN Premiere Club 2014
ASN Achiever Club 2014
Leader Name
Channel
Position
Year to date net ALP
Year to date net Cases
Danny BUSS BP 1131452 10
Danny BUSS BP 566570 17
SWAMY BUSS BP 476581 10
4 00706499 Walter Danny BUSS BP 262942 10
5 00706497 Olivia Danny BUSS BP 186650 10
6 0010106 Scarlet Jonhson Tony Stark BUSS BP 175372 10
7 0010101 Mary Jen Peter BUSS BP 110070 10
8 00706494 GOPAL RAJGOPAL BUSS BP 86100 10
9 0010102 Ethan Hunt Peter BUSS BP 83470 10
10 0010104 Tony Stark Nick Fury BUSS BP 77020 10
11 00706493 RAJ RAJGOPAL BUSS BP 63850 10

Figure 1.68 **Member List screen**

7.1.3 Potential Club

This functionality enables the agent to know the additional business required to qualify for the aspired club.

2. Agent can view the list of all the clubs.

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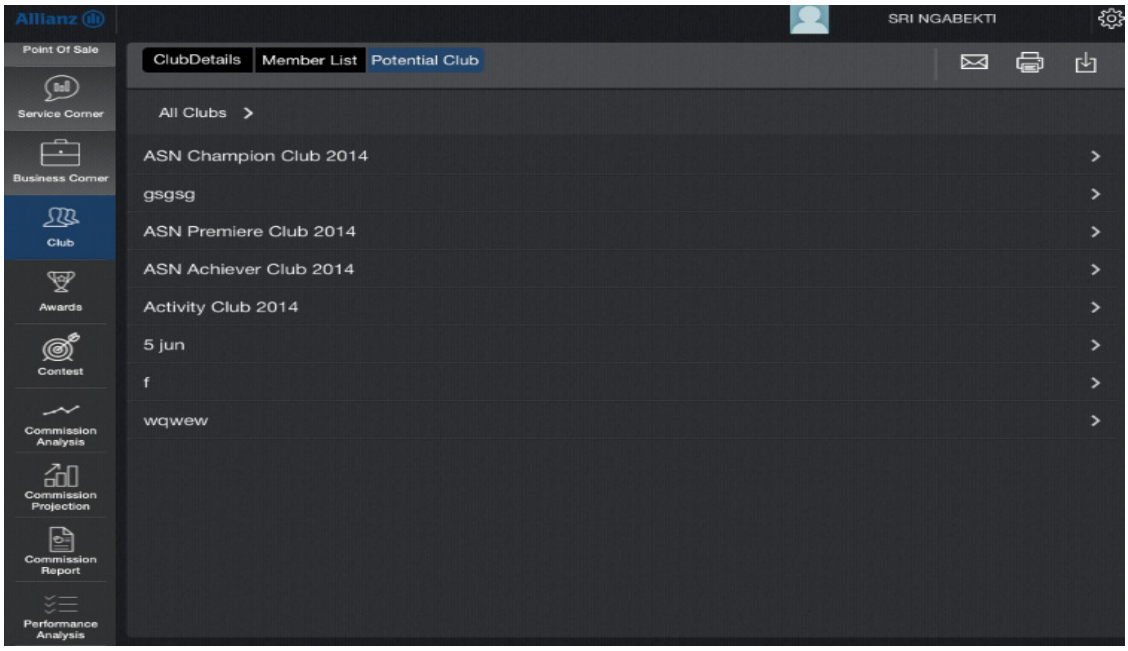

Figure 1.69 **Potential Club screen**

2. Agent can filter the clubs based on club type.

2.1 Select on club type button to view list of club types.

2.2 Select a club type to view the list of club names for the selected club type.

3. Agent can view additional business required for the aspired club.

3.1 Select a club name to view list of applicability level for that club.

3.2 Select an applicability level and view the additional business required for the selected parameter.

3.3 By default additional business required is displayed in graphical form.

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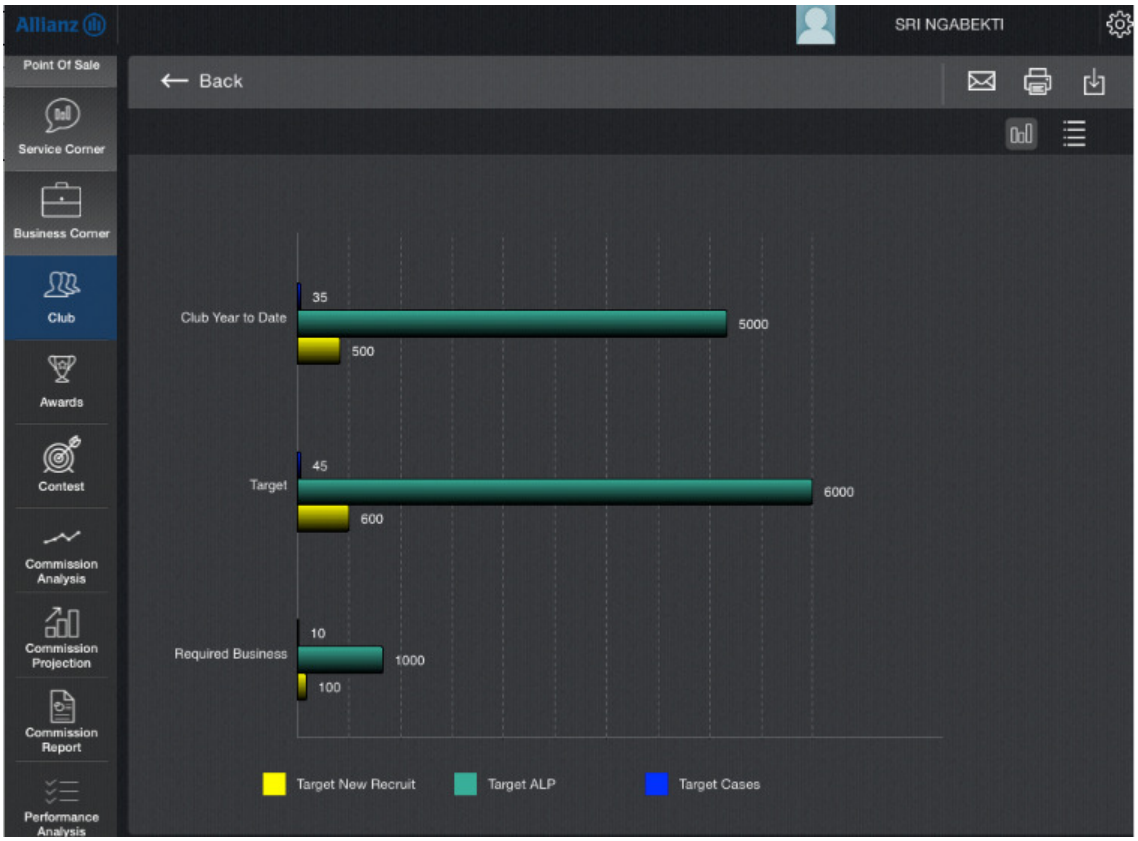

Figure 1.70 **Additional business required graphical form.**

7.6 To view additional business required in tabular form tap on list button

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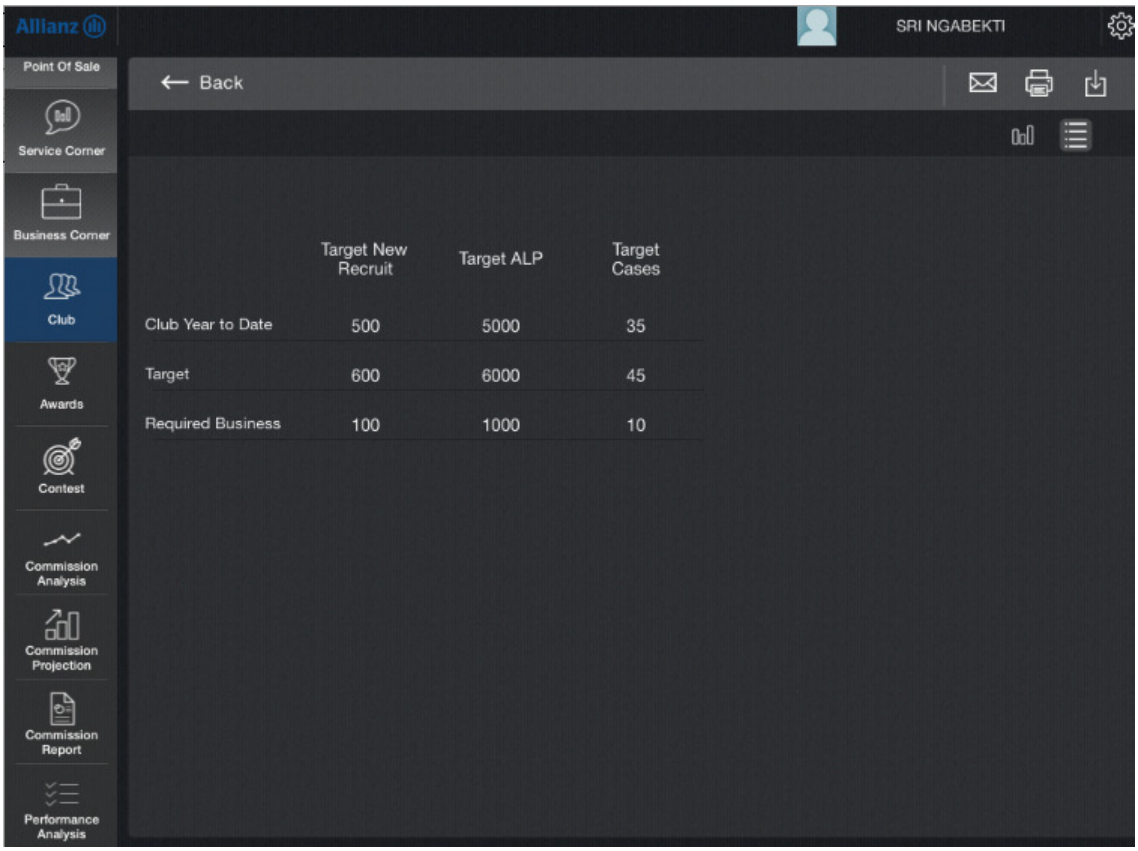

Figure 1.71 **Additional business required in tabular form**

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7.2 Awards

A sense of motivation and competition is created amongst ASN agents by means of awards for different business measures at different agent levels.

7.2.1 List of awards

On tap of award name, the list of available awards should appear.

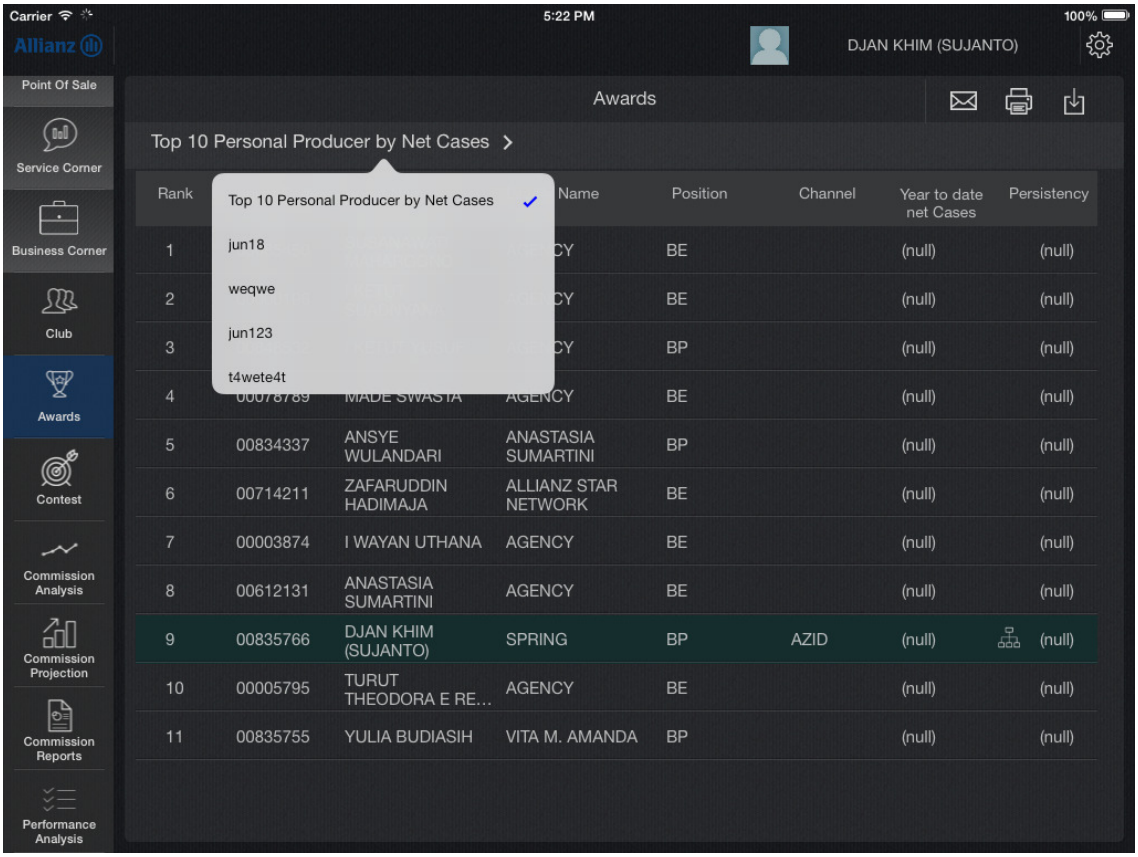

Figure 1.72 List of awards available.

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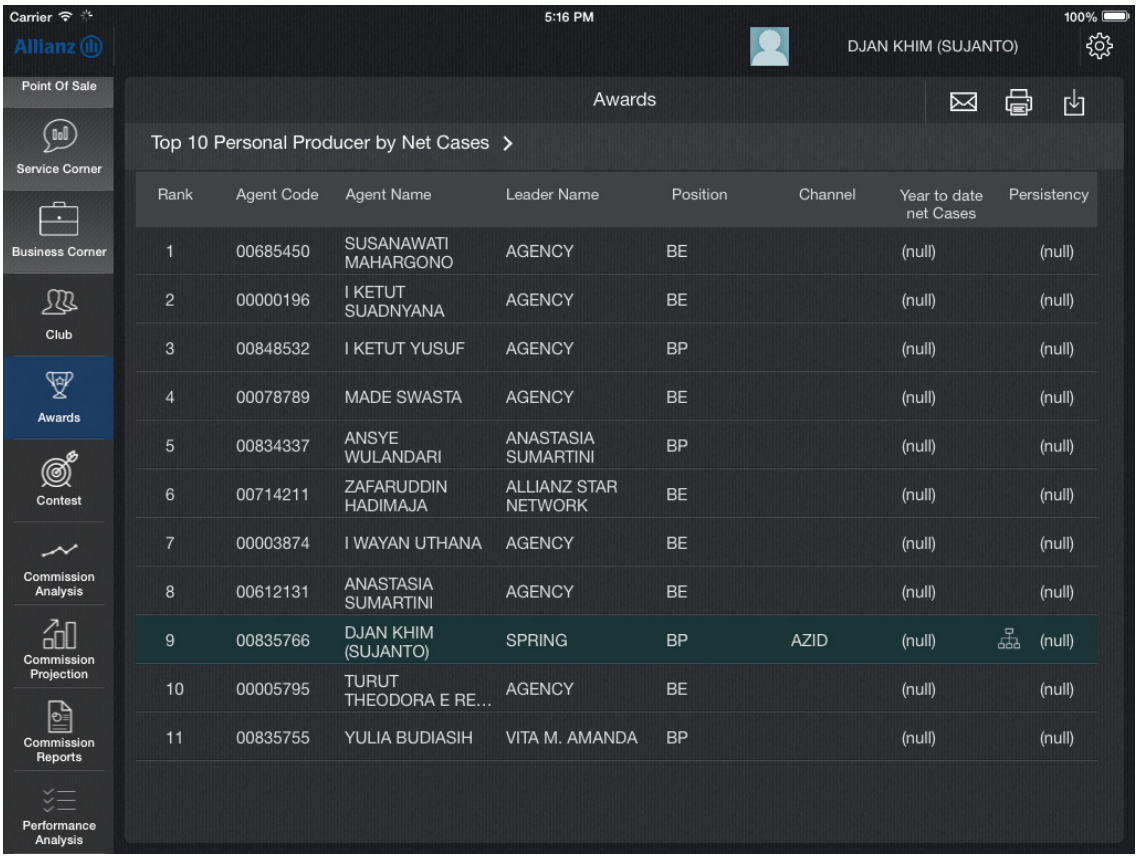
7.2.2 BP Winner user

If a BP user is under top 20 winners rank, in case of Top 10 personal producers category then his name will appear in a different color with hierarchy logo sticked on it.



Rank	Agent Code	Agent Name	Leader Name	Position	Channel	Year to date net Cases	Persistency
1	00685450	SUSANAWATI MAHARGONO	AGENCY	BE		(null)	(null)
2	00000196	I KETUT SUADNYANA	AGENCY	BE		(null)	(null)
3	00848532	I KETUT YUSUF	AGENCY	BP		(null)	(null)
4	00078789	MADE SWASTA	AGENCY	BE		(null)	(null)
5	00834337	ANSYE WULANDARI	ANASTASIA SUMARTINI	BP		(null)	(null)
6	00714211	ZAFARUDDIN HADIMAJA	ALLIANZ STAR NETWORK	BE		(null)	(null)
7	00003874	I WAYAN UTHANA	AGENCY	BE		(null)	(null)
8	00612131	ANASTASIA SUMARTINI	AGENCY	BE		(null)	(null)
9	00835766	DJAN KHIM (SUJANTO)	SPRING	BP	AZID	(null)	(null)
10	00005795	TURUT THEODORA E RE...	AGENCY	BE		(null)	(null)
11	00835755	YULIA BUDIASIH	VITA M. AMANDA	BP		(null)	(null)

Figure 1.73. **If winner is BP under 20 rank.**

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7.2.3 BP Winner user can see his hierarchy

ASN BP user when taps on his name then agent reporting to him will appear along with their ranks following user's cell.

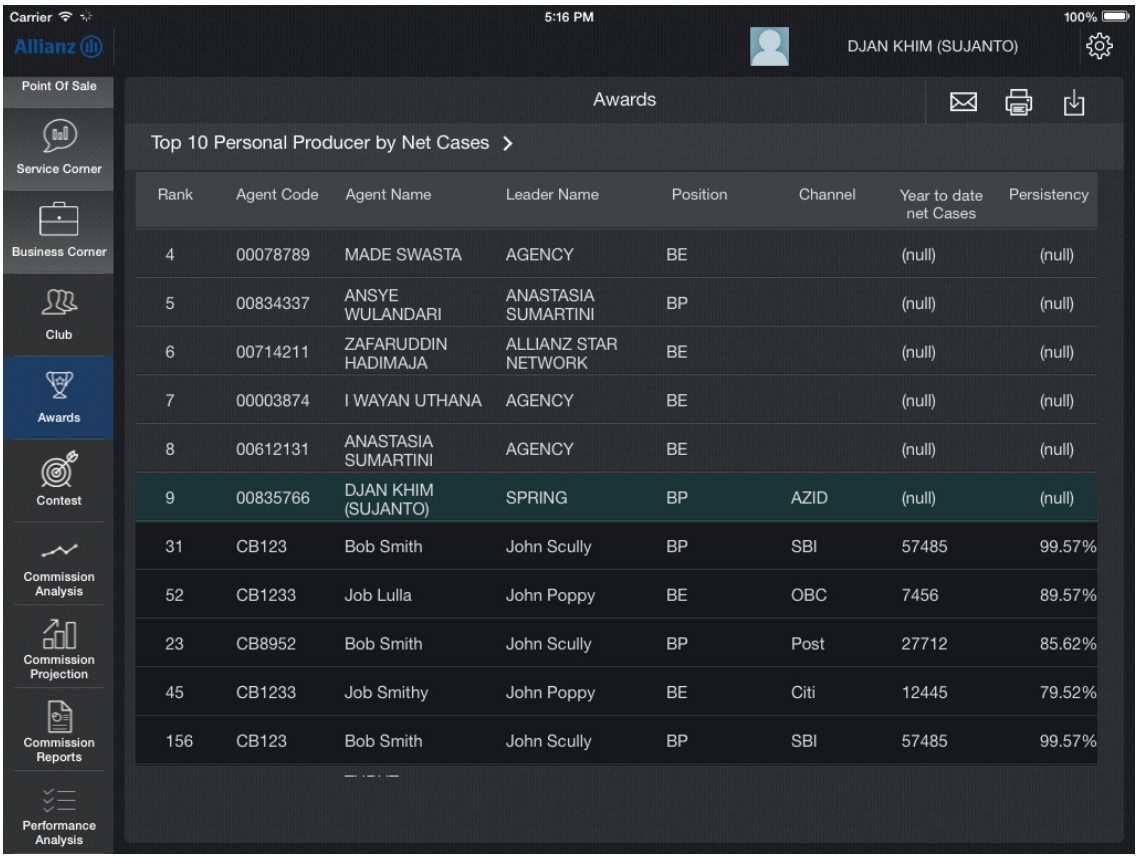
Carrier
5:16 PM
100%
Allianz
DJAN KHIM (SUJANTO)
Point Of Sale
Service Corner
Business Corner
Club
Awards
Contest
Commission Analysis
Commission Projection
Commission Reports
Performance Analysis
Awards
Top 10 Personal Producer by Net Cases
Rank
Agent Code
Agent Name
Leader Name
Position
Channel
Year to date net Cases
Persistency
4 00078789 MADE SWASTA AGENCY BE (null) (null)
5 00834337 ANSYE WULANDARI ANASTASIA SUMARTINI BP (null) (null)
6 00714211 ZAFARUDDIN HADIMAJA ALLIANZ STAR NETWORK BE (null) (null)
7 00003874 I WAYAN UTHANA AGENCY BE (null) (null)
8 00612131 ANASTASIA SUMARTINI AGENCY BE (null) (null)
9 00835766 DJAN KHIM (SUJANTO) SPRING BP AZID (null) (null)
31 CB123 Bob Smith John Scully BP SBI 57485 99.57%
52 CB1233 Job Lulla John Poppy BE OBC 7456 89.57%
23 CB8952 Bob Smith John Scully BP Post 27712 85.62%
45 CB1233 Job Smithy John Poppy BE Citi 12445 79.52%
156 CB123 Bob Smith John Scully BP SBI 57485 99.57%

Figure 1.74 **BP user with hierarchy.**

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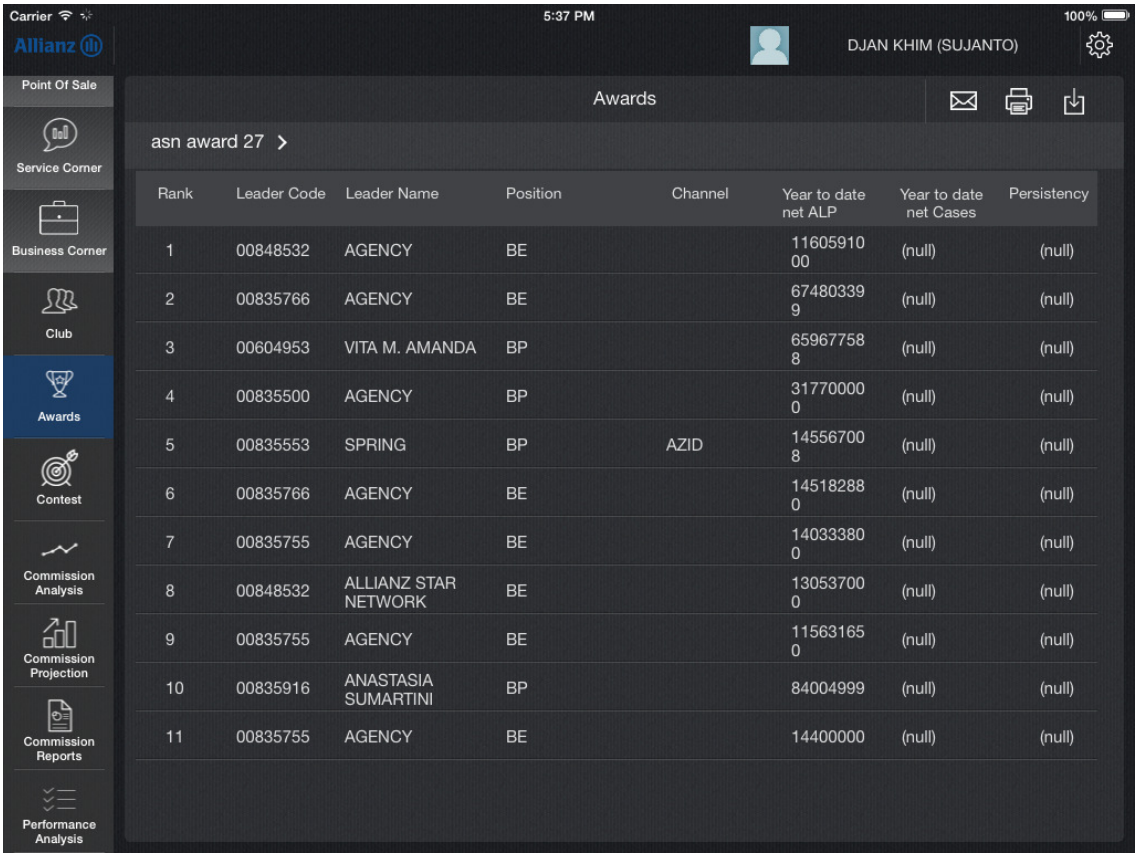
7.2.4 Other Awards

If the user selects any other awards then only list of winners will appear.



Rank	Leader Code	Leader Name	Position	Channel	Year to date net ALP	Year to date net Cases	Persistency
1	00848532	AGENCY	BE		1160591000	(null)	(null)
2	00835766	AGENCY	BE		674803399	(null)	(null)
3	00604953	VITA M. AMANDA	BP		659677588	(null)	(null)
4	00835500	AGENCY	BP		317700000	(null)	(null)
5	00835553	SPRING	BP	AZID	145567008	(null)	(null)
6	00835766	AGENCY	BE		145182880	(null)	(null)
7	00835755	AGENCY	BE		140333800	(null)	(null)
8	00848532	ALLIANZ STAR NETWORK	BE		130537000	(null)	(null)
9	00835755	AGENCY	BE		115631650	(null)	(null)
10	00835916	ANASTASIA SUMARTINI	BP		84004999	(null)	(null)
11	00835755	AGENCY	BE		14400000	(null)	(null)

Figure 1.75 **Winners list for other awards**

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7.3 Contests

ASN agents are motivated in the form of various contests from time to time.

7.3.1 Contest Details

Agent can view the contest details

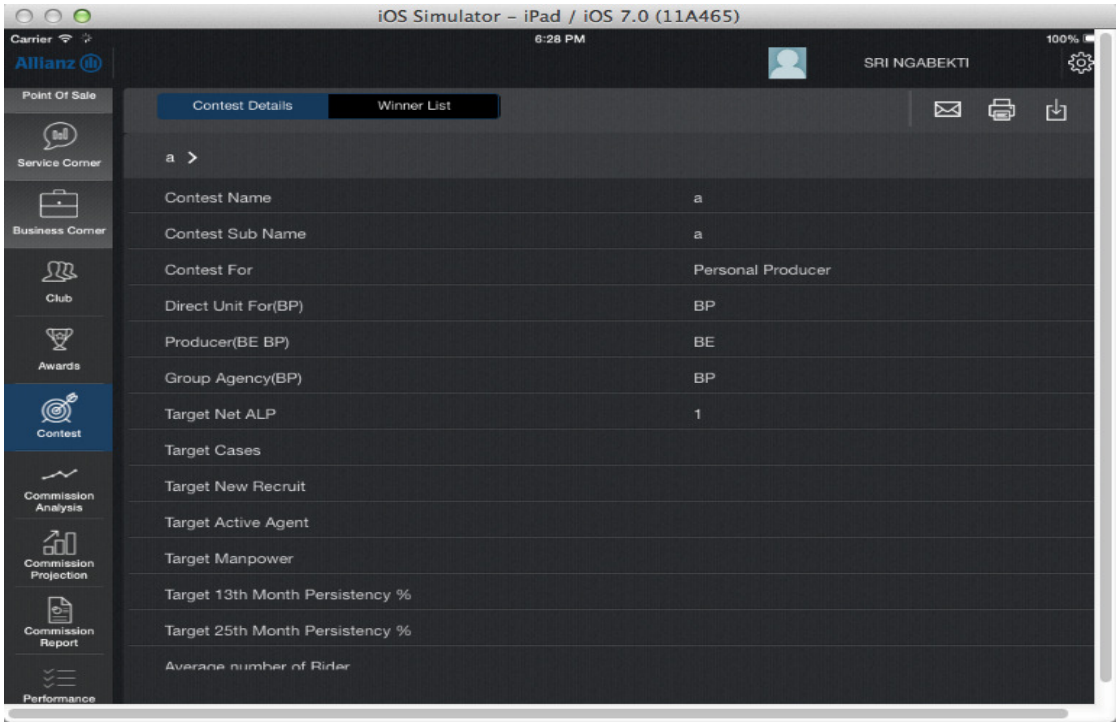

Figure 1.76 Contest details

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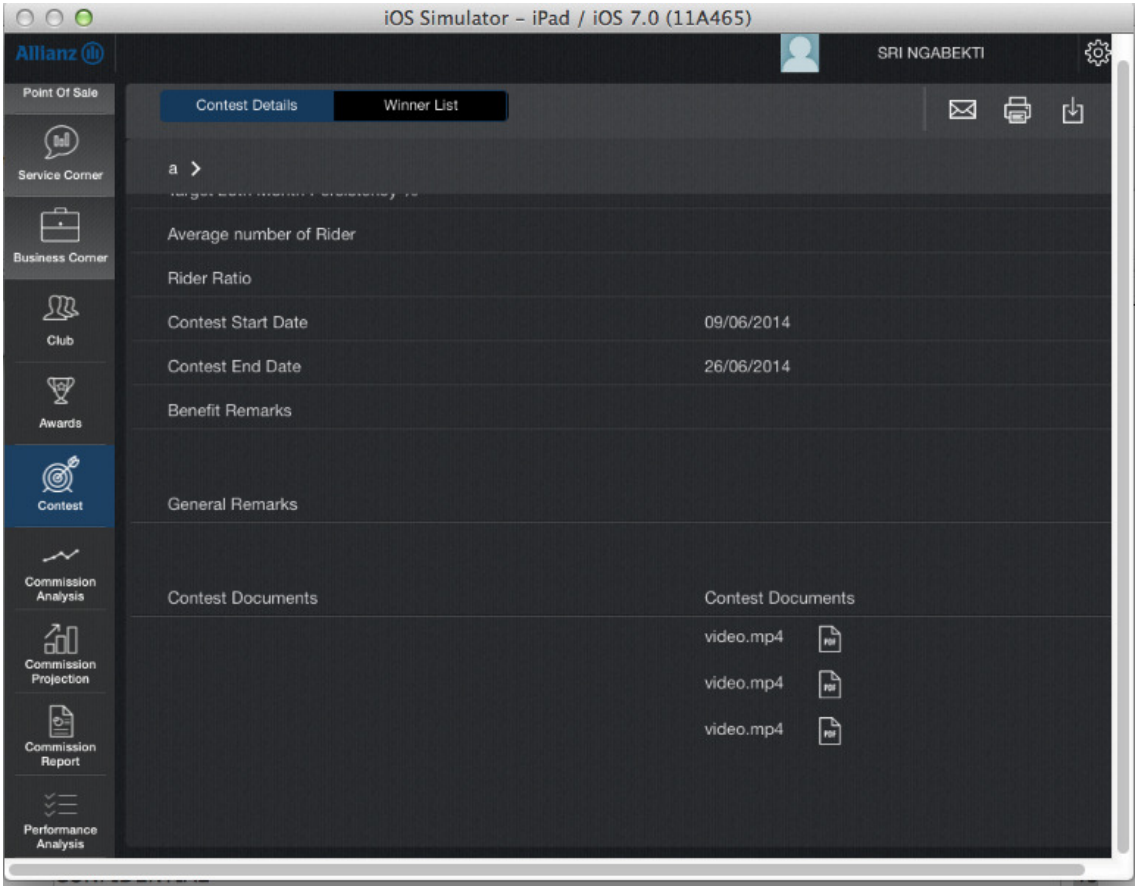

Figure 1.77 Contest details expanded

When the agent taps on the document icon, then corresponding contest document is displayed.

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7.3.2 **Contest** Winner List

Agents can view winner list of particular contest. Agent can select the contest whose winner list is to be viewed from the contest list.

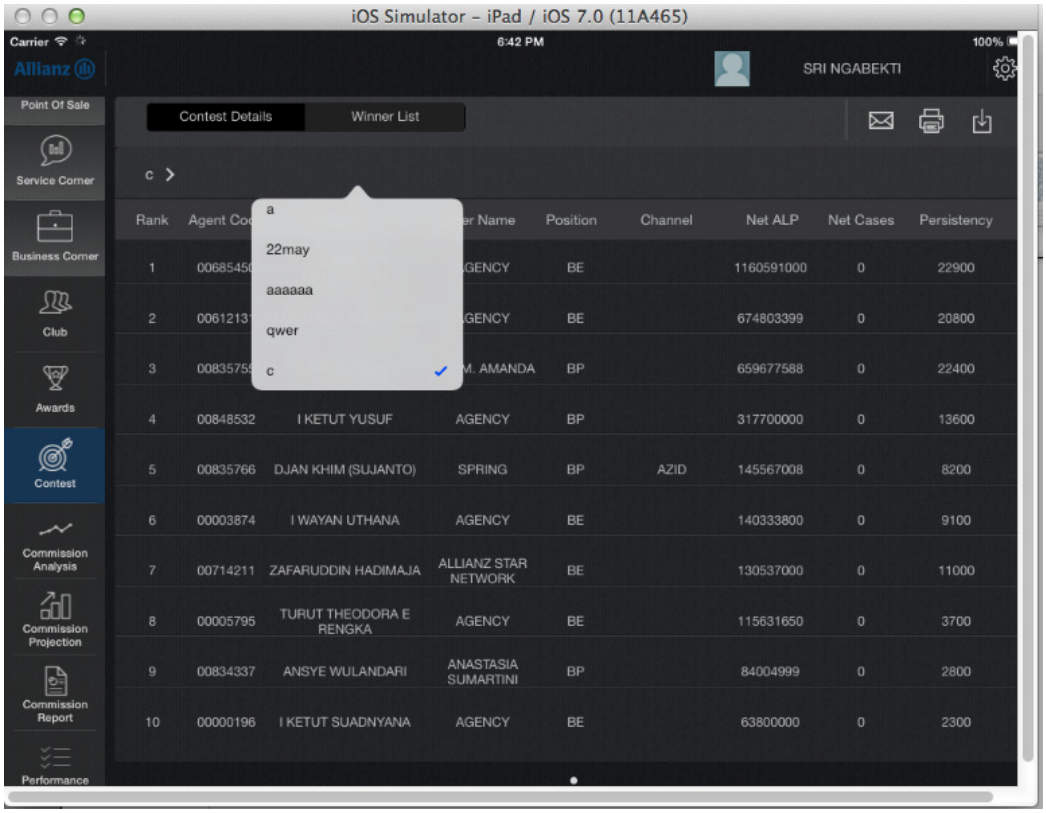

Figure 1.78 Contest winners list

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7.4 Commission Analysis

This module enables ASN agent to analyze their commission earnings in the form of commission type and product type as different parameters.

ASN Agents can analyze commission in terms of two parameters for each analysis category

1. Commission type

2. Product

Here commission type is default category.

7.4.1 Commission type

Agent has to select two parameters under commission type category:

1. Commission type

2. Period

List of values for commission type parameter:

1. First year commission

2. Second year commission

3. Renewal commission

4. Overriding direct unit

5. Generation overriding commission

6. Total commission

List of values for period type parameter:

1. Current year

2. Previous year

3. Current year vs previous year

4. from date – To date

Select one option for commission type and period each.

For ex: commission type = First year commission and period = Current year. User can view commission analysis data either in graphical form or tabular form.

Commission analysis data in graphical form:

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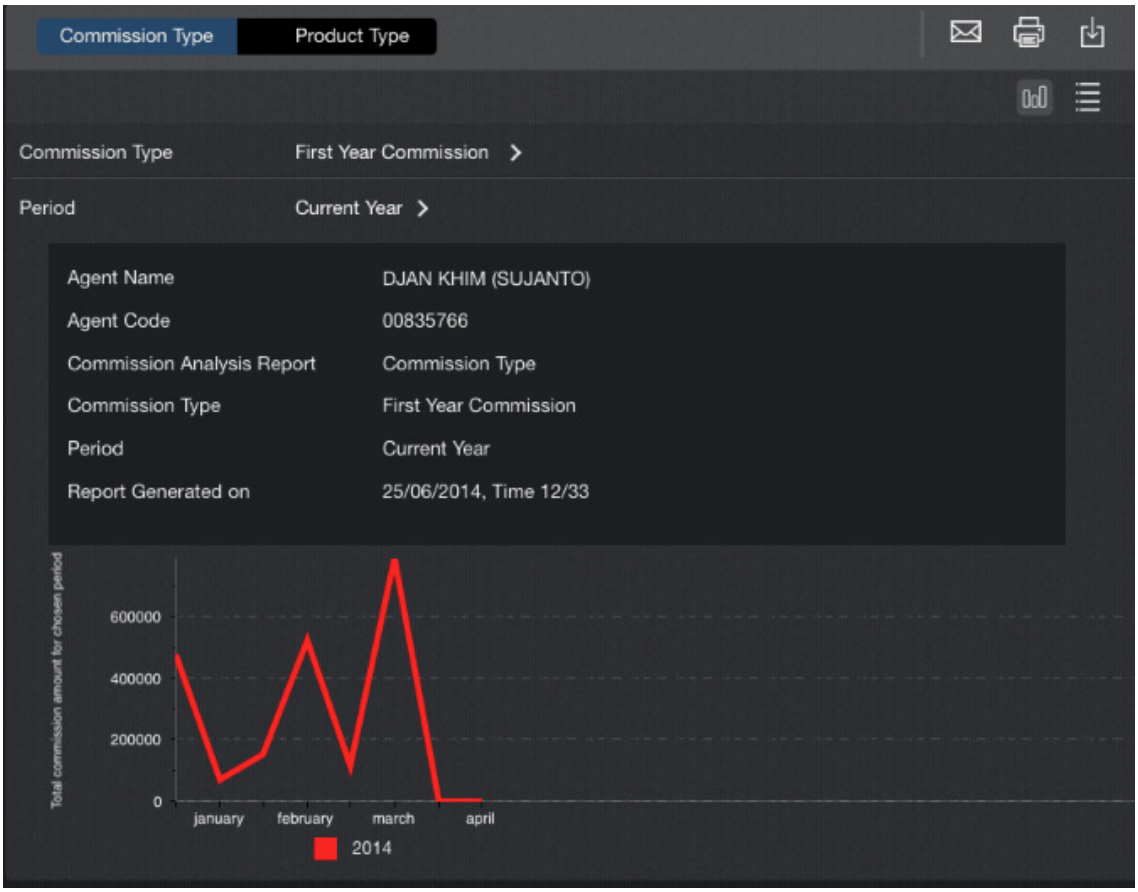

Figure 1.79 Commission type analysis in graphical form

Tap on list button to view the commission analysis data in the tabular form.

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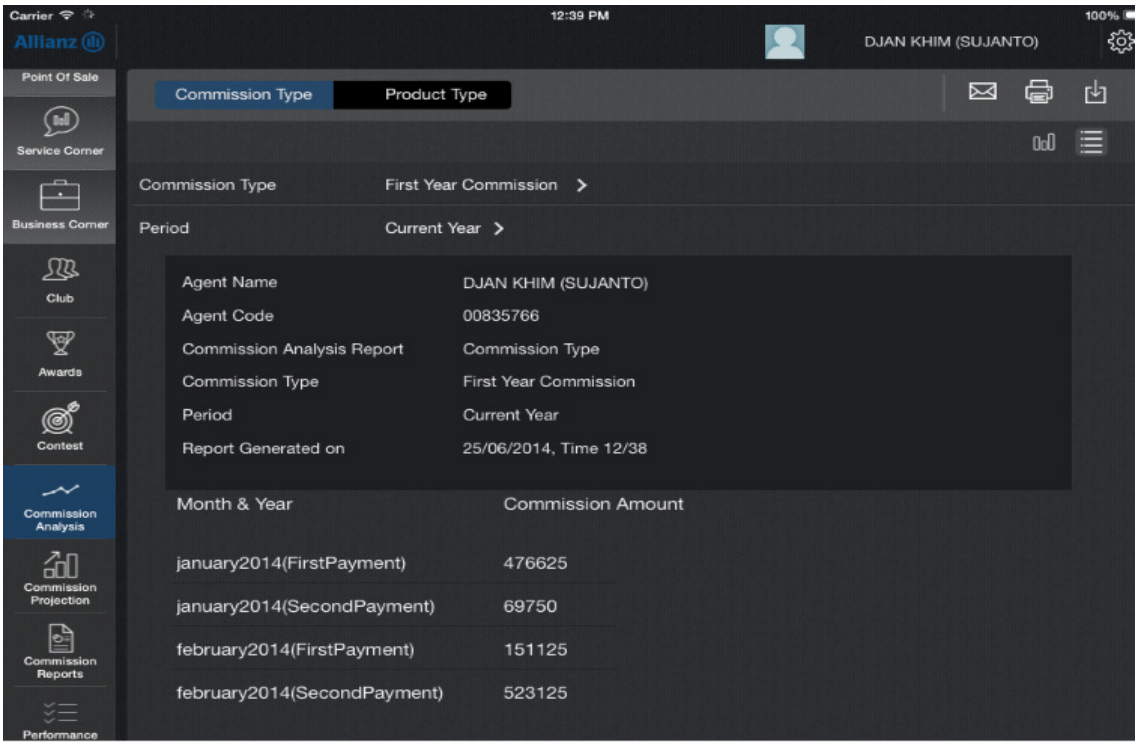

Figure 1.80 Commission type analysis in tabular form

7.4.2 Product Type

Parameter values for product type category is:

1. Product type

2. Period type

List of parameter values for product type is as under:

1. Traditional

    MyEducation-IDR

    MyFuture-IDR Endowment Retirement 60

    My Protection-IDR

2. Unit – Linked

    AlliSya Maxi Fund Plus –IDR

    SmartLink New Flexi Account – IDR

    AlliSya Protection + IDR

    SmartLink Maxi Fund Plus – IDR

    SmartLink New Flexi Account – USD

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SmartLink Flexi Account + IDR

3. Health

AlliSya Care IDR

SmartHealth Maxi Violet – IDR

SmartHealth Maxi Violet – USD

List of parameter values for Period is :

1. Current year

2. Previous year

3. Current vs previous year

4. From date – To date

User has to select one option for each Product type and period type. For ex : Product type: AlliSya Care IDR and period type = Previous year.

User can view commission analysis data in graphical form and tabular form.

Commission analysis data in graphical form:

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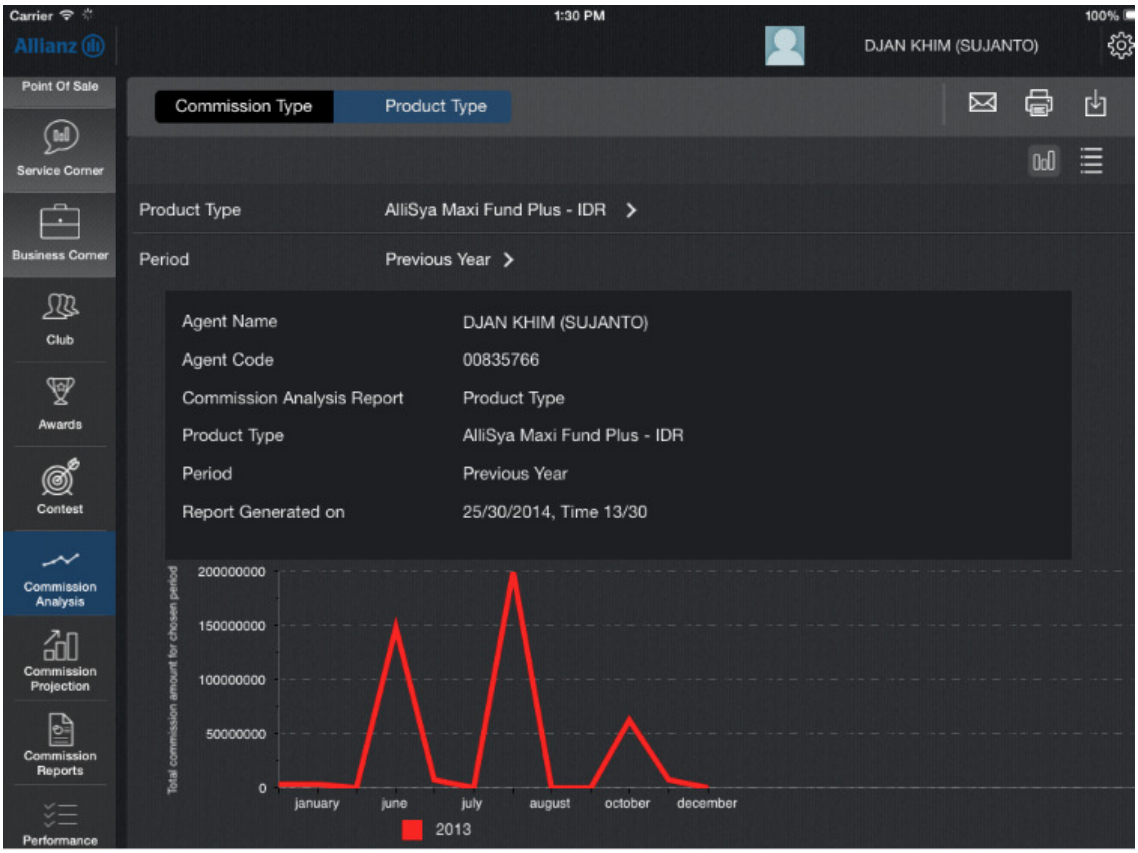

Figure 1.81 product type analysis in chart form

Tap on list button to view the commission analysis data in tabular form

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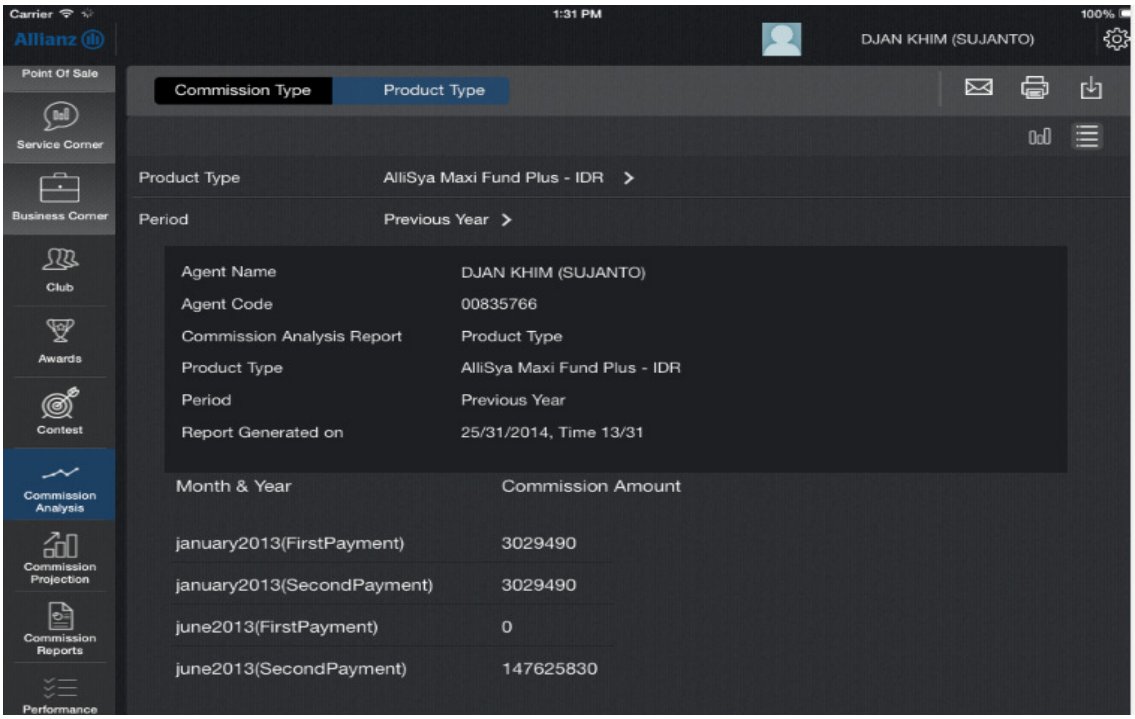

Figure 1.82 product type analysis in chart form

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7.5 Commission Projection

ASN agents should be able to see the projection of base commission earnings so as to understand the number of cases and the amount of premium to be brought in as business to earn an aspired level of commission.

Agent can select up to 5 products from the list of products on the left side having categories Traditional, Unit Linked and Health.

Product selection is done by tapping on checkbox.On selecting 6th product then the first product selected will be replaced with the recent product selection but the order of products selected will be arranged in the first-in-first-service basis.

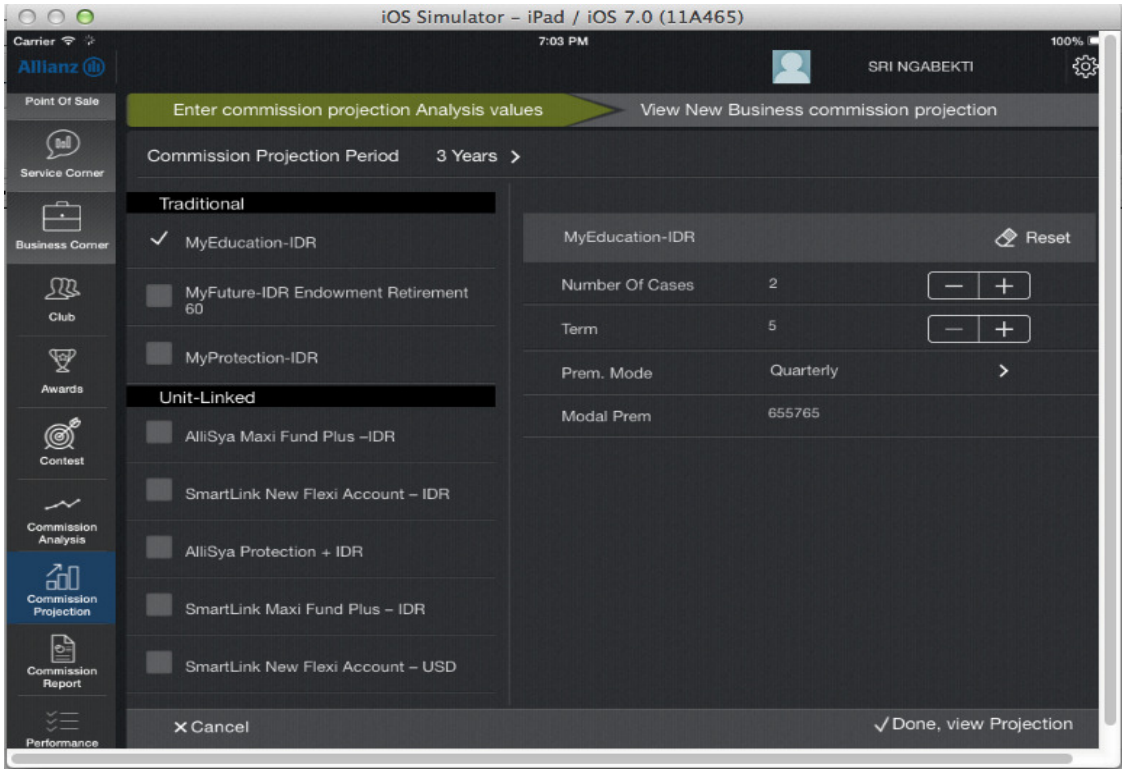

Figure 1.83 Selection screen of commission projection.

User can select commission projection period from the list. By default 3 years is selected.

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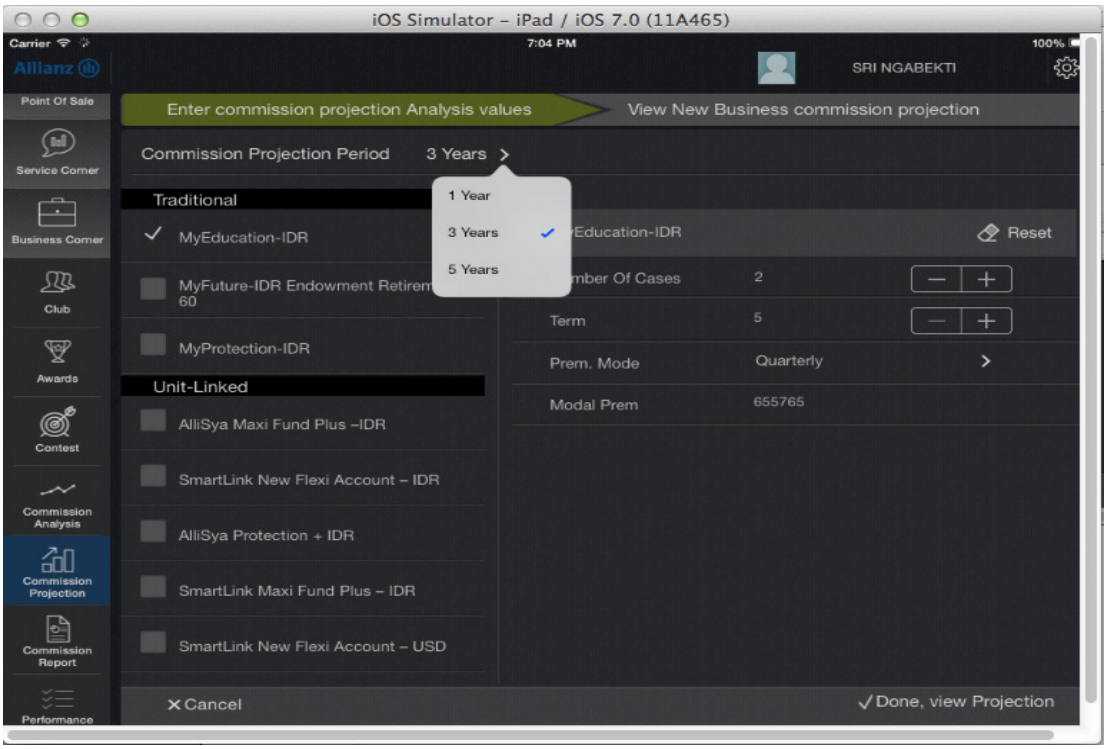

Figure 1.84 Selection of Period commission projection.

User can reset the values related to the product using Reset button

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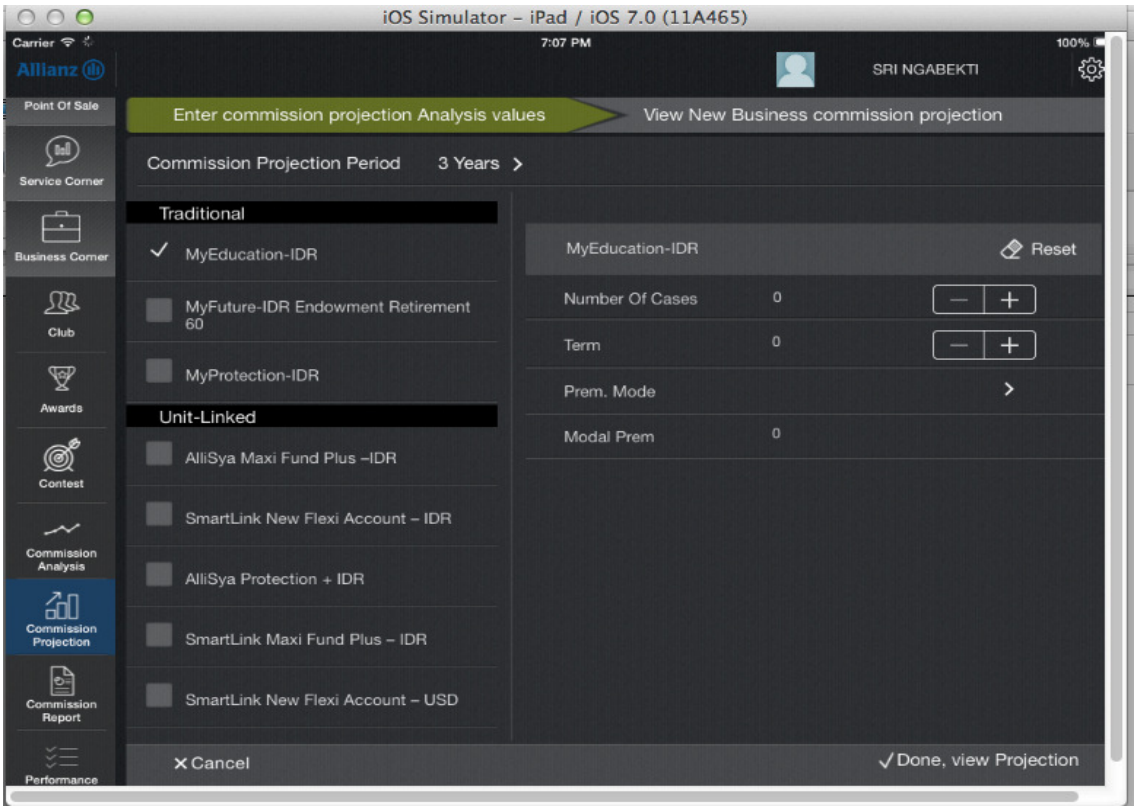

If the agent wishes to remove a product then tap on the corresponding check sign

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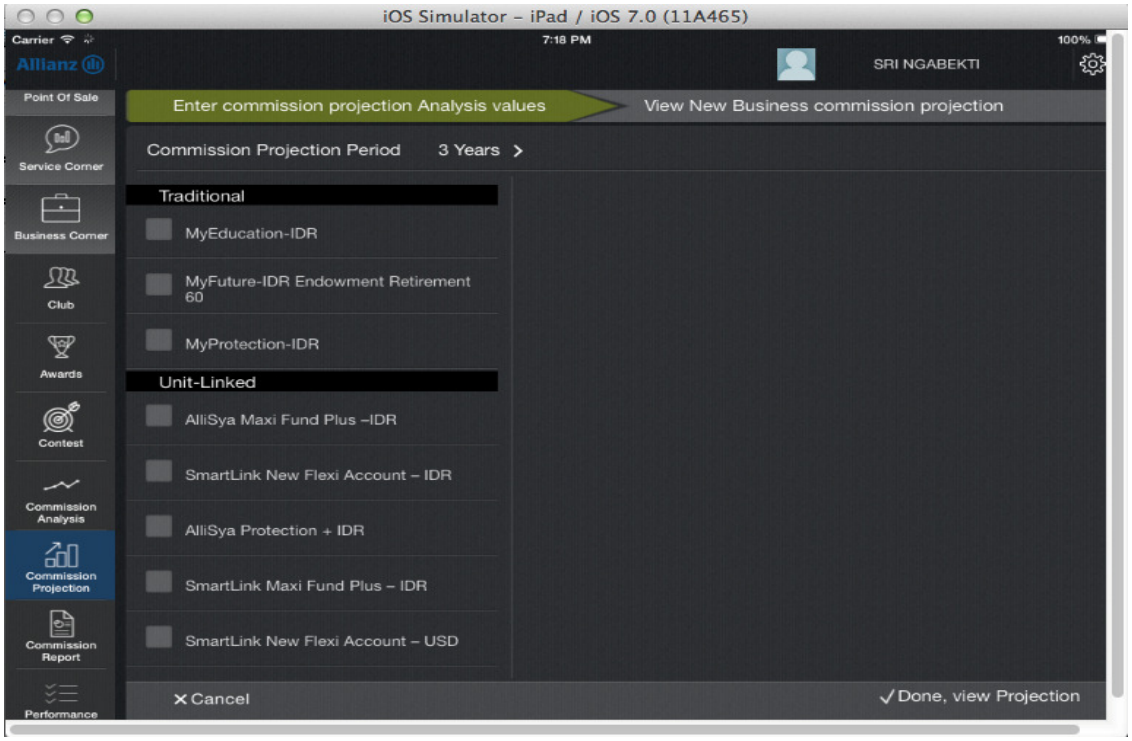

Figure 1.85 On tapping cancel button

If the agent wishes to remove all the products then click on Cancel button on bottom left corner

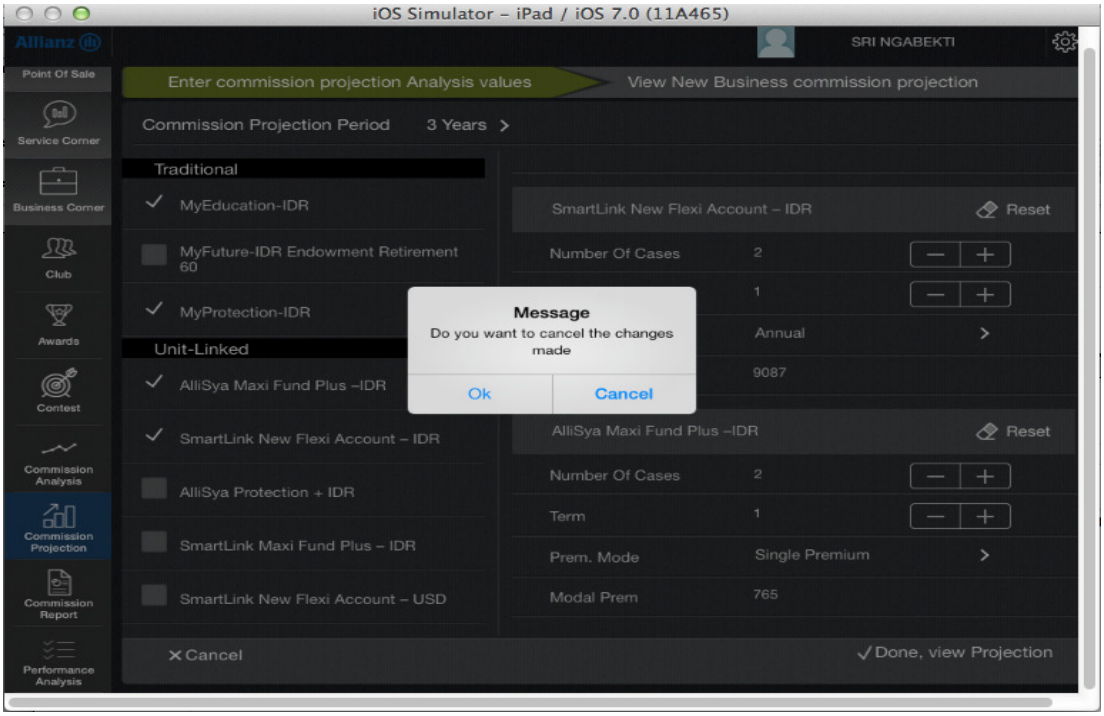

Figure 1.85 Prompt to warn loss of selection

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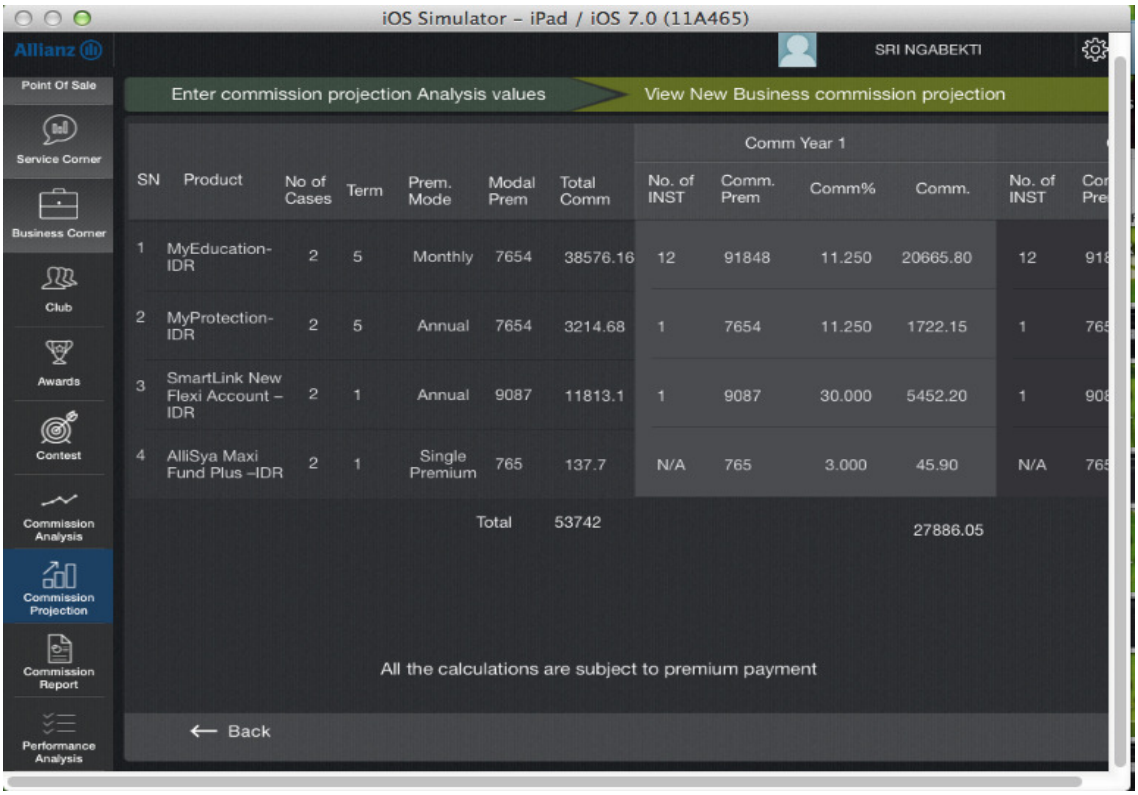
After selecting products and entering corresponding values, business commission projection can be viewed by tapping on Done, view Projection.


iOS Simulator – iPad / iOS 7.0 (11A465)
Allianz
SRI NGABEKTI
Point Of Sale
Service Corner
Business Corner
Club
Awards
Contest
Commission Analysis
Commission Projection
Commission Report
Performance Analysis
Enter commission projection Analysis values
View New Business commission projection
Comm Year 1
SN Product No of Cases Term Prem. Mode Modal Prem Total Comm No. of INST Comm. Prem Comm% Comm. No. of INST
1 MyEducation-IDR 2 5 Monthly 7654 38576.16 12 91848 11.250 20665.80 12
2 MyProtection-IDR 2 5 Annual 7654 3214.68 1 7654 11.250 1722.15 1
3 SmartLink New Flexi Account – IDR 2 1 Annual 9087 11813.1 1 9087 30.000 5452.20 1
4 AlliSya Maxi Fund Plus –IDR 2 1 Single Premium 765 137.7 N/A 765 3.000 45.90 N/A
Total 53742 27886.05
All the calculations are subject to premium payment
Back
Figure 1.86 Screen with calculation

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7.6 Commission Reports

User would be able to conclude his earning based on period and payment received. The commission earned twice a month can be extracted by selecting month and payment number of user's choice. User would be able to see his earnings up to one year only.

7.6.1 Options to choose Period

Report can be generated based on 4 categories.

1. Current year
2. Previous year
3. Current Vs Previous year
4. Date range

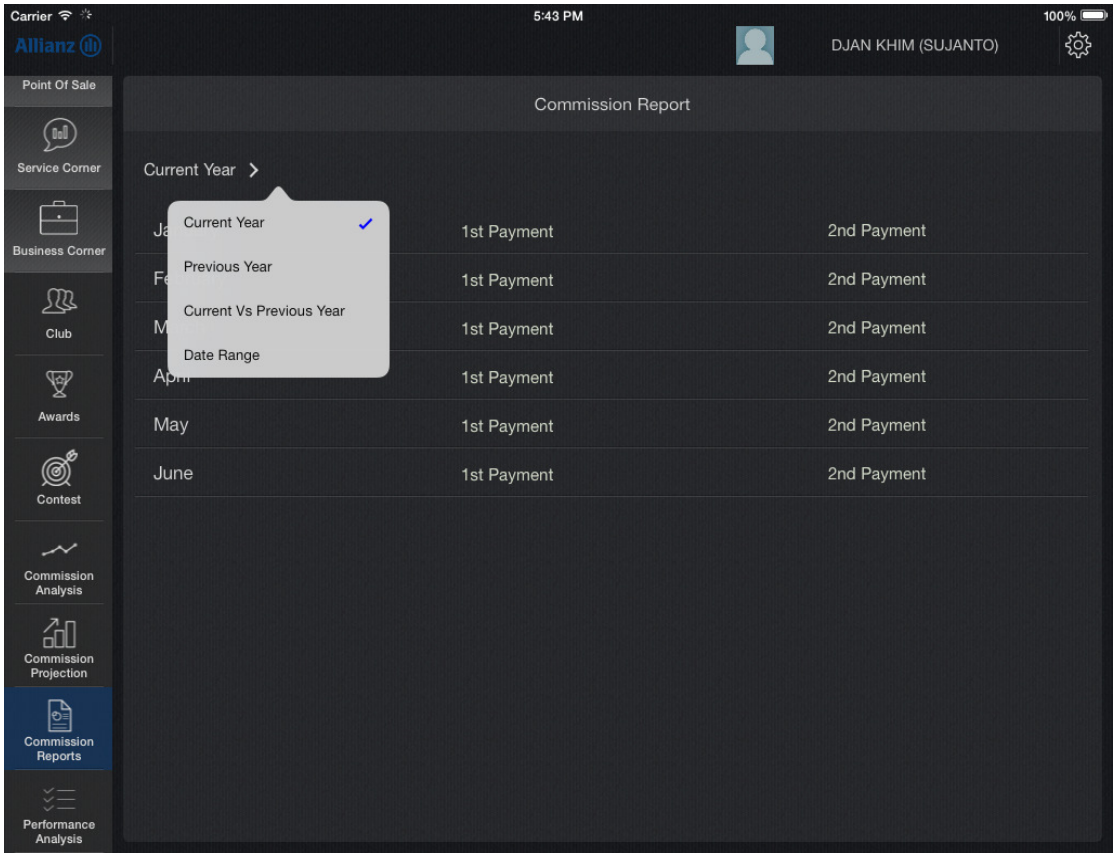

Figure 1.87. Selecting period for report generation.

7.6.2 from date – To date Selection

Selecting date range as period gives a set of months falling between two dates selected. This range could be up to one year.

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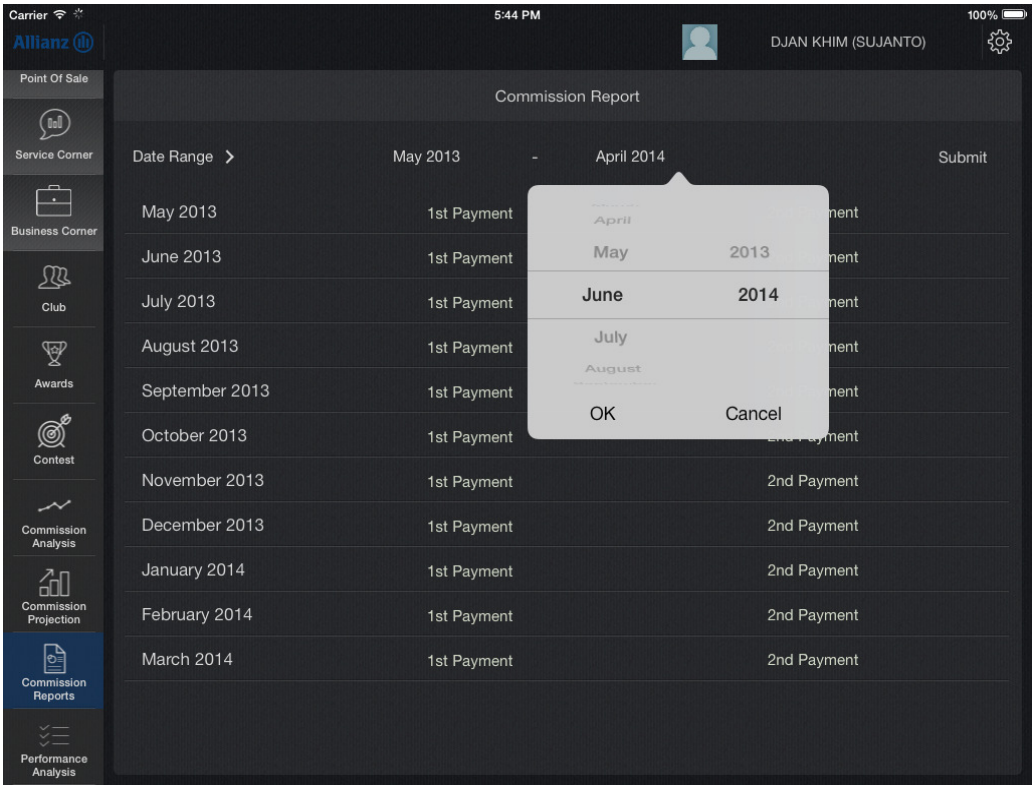

Figure 1.88. Selecting date range

If tried violating range a warning appears to inform unavailability of schedule.

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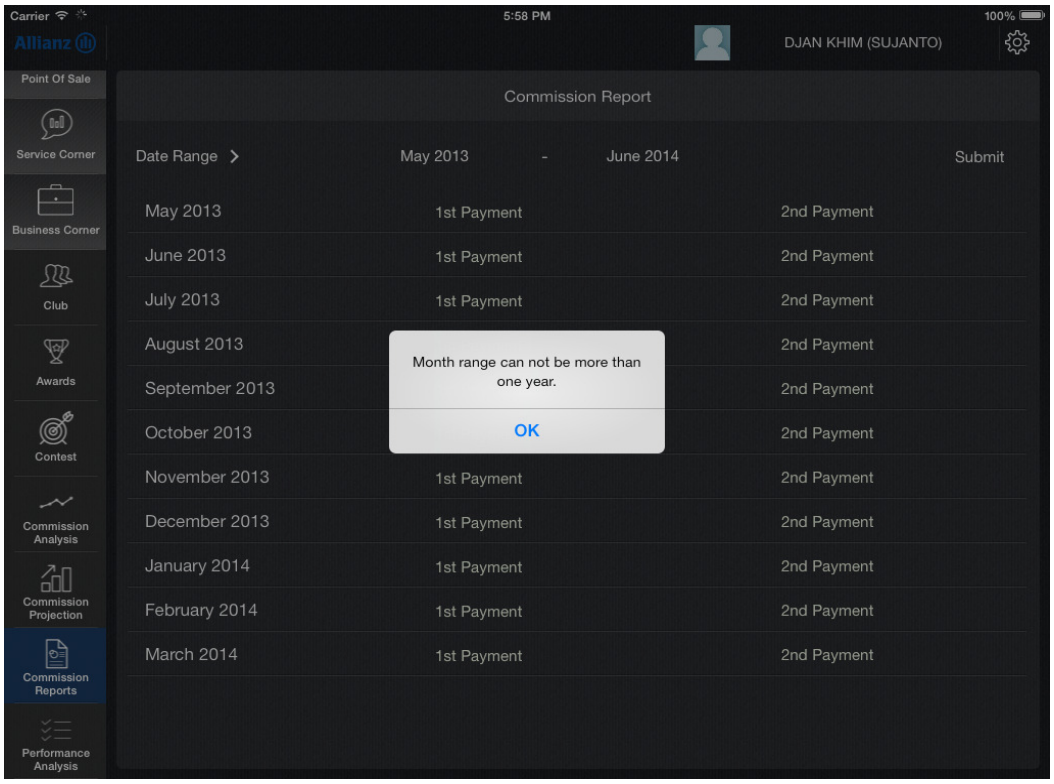

Figure 1.89. Warning prompt for input beyond one year

7.6.3 Report summary

When a period is selected by tapping payment number button, report summary appears.

The Summary contains two sections:

1. Selected details: Comprising of basic details and parameters for which report has been generated.

2. Report Summary: This section comprises of earnings generated as on FYC,SYC,RNC,Overriding Commissions, Adjustments, tax.

- This report can be generated in IDR only.

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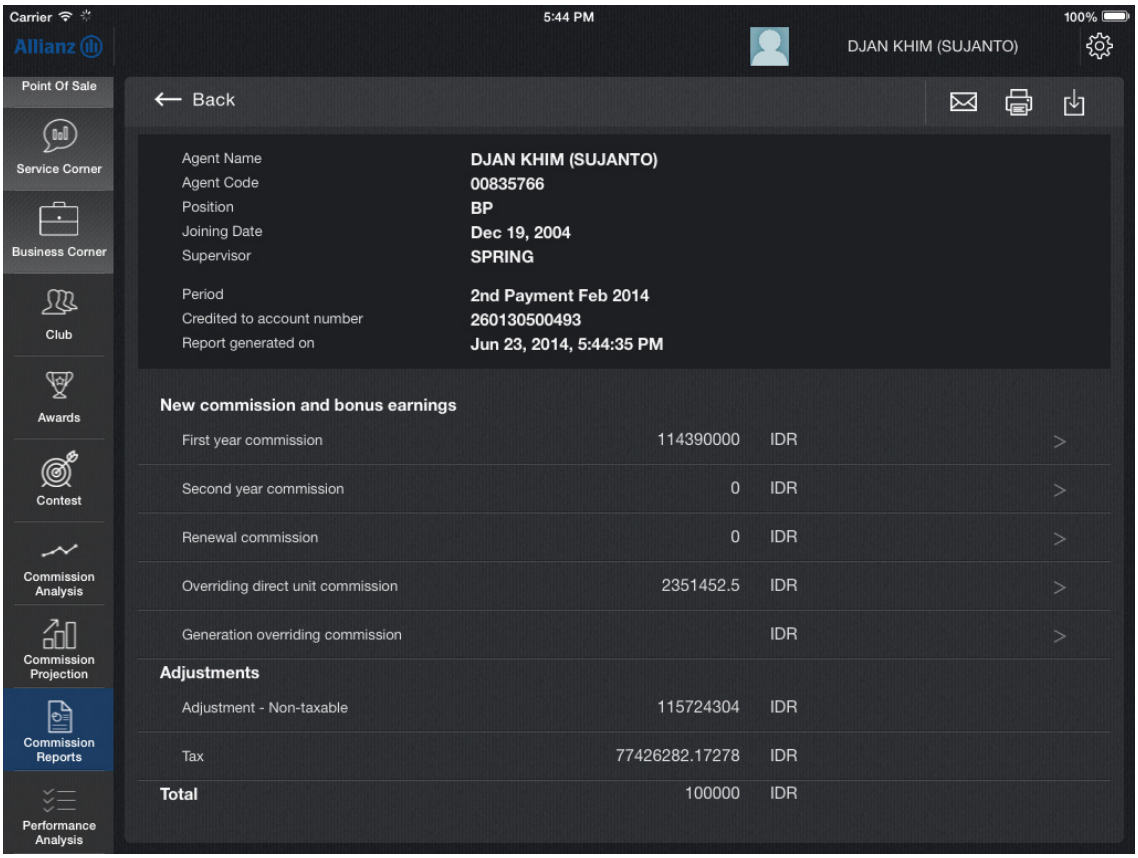

Figure 1.90. Commission report summary

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7.6.4 Report details

On selecting a kind of commission from summary, a detailed screen will appear.

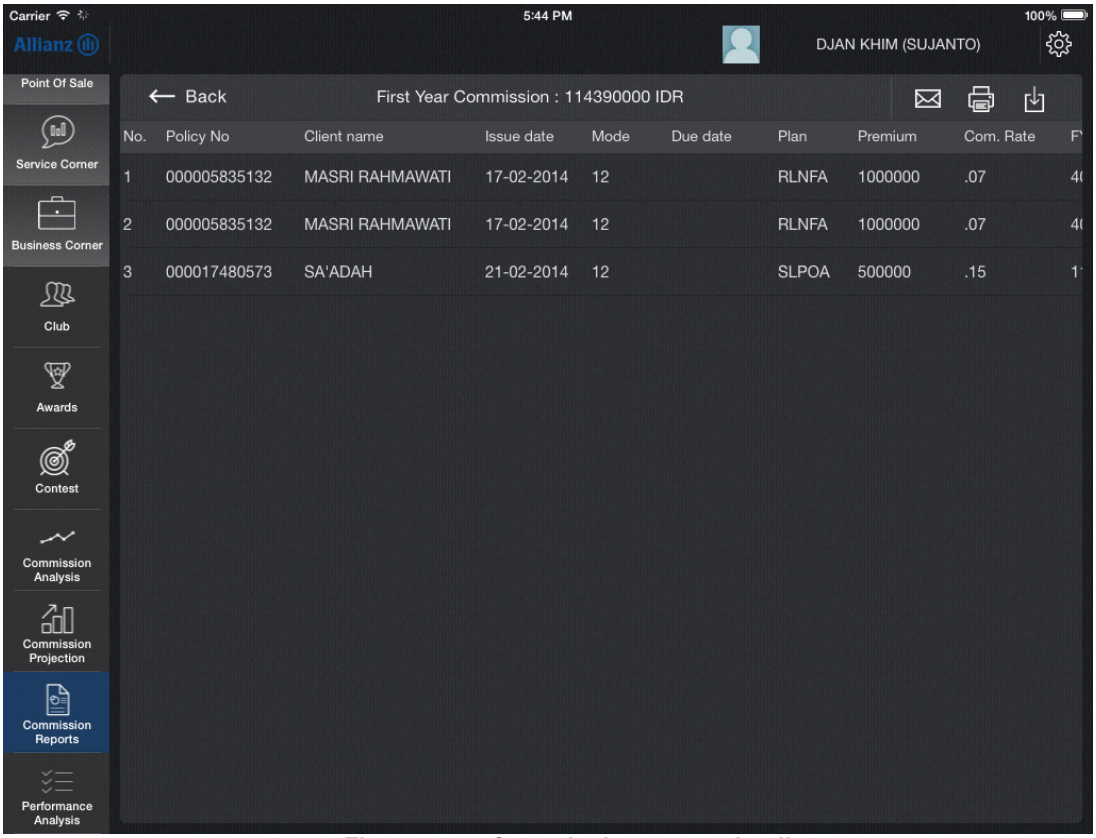

Figure 1.91. Commission report detail

On tapping a kind of eared commission, details of earning appears.

The screen would be scrollable both horizontal and vertical.

Indicative fields for commission are -

For FYC/SYC/RNC:

No., Policy Number, Client name, Issue date, mode, due date, plan, premium, commission rate, FYC/SYC/RNC, Premium type.

For Overriding commission:

No, Get from agent code, Agent name, designation, policy no, Premium, commission, rate, amount, premium type.

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7.7 Performance Analysis

ASN agents should be able to see their business performance in terms of dashboard. Also the supervising agent otherwise called as leaders (BP) should be able to monitor the performance of their sub-ordinate agents.

7.7.1 Selection of parameters

The screen displays various parameters depending on performance of individuals' performance can be evaluated.

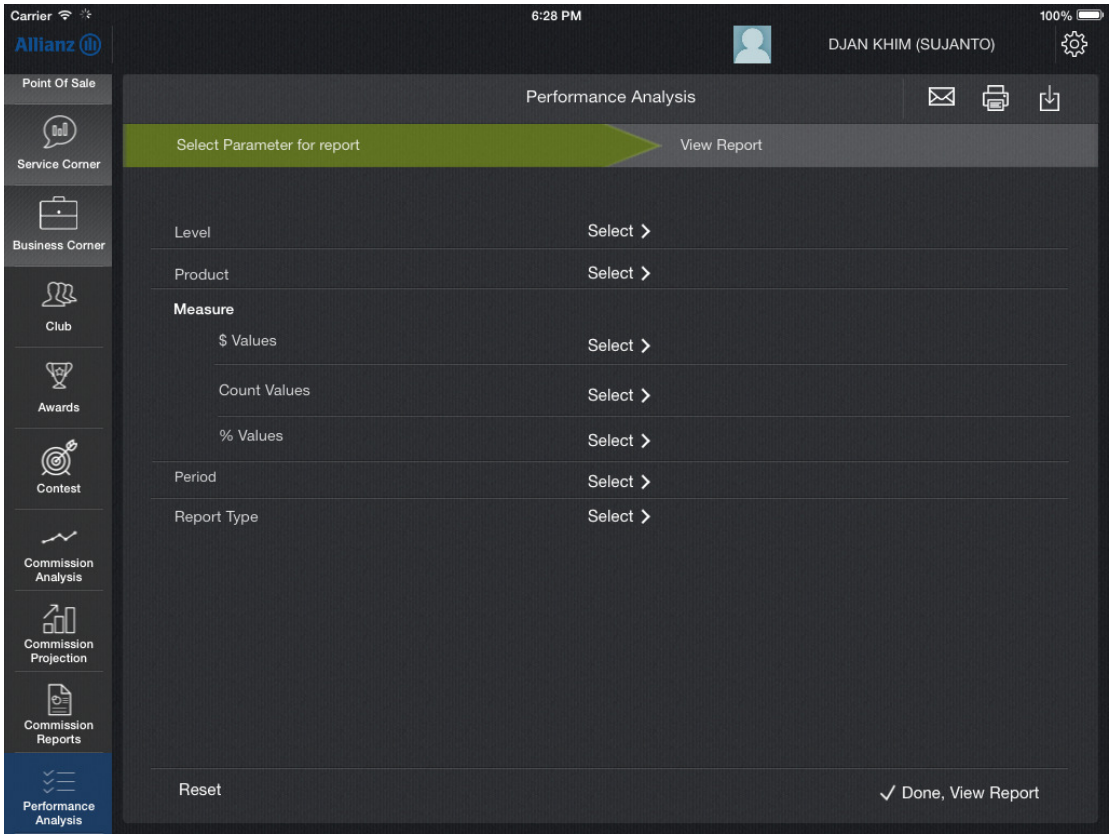

Figure 1.92. Parameters selection screen

Broadly there are five basis for proceedings -

1. Level
2. Product
3. Measure
4. Period
5. Report type

At any instance, user would be able to reset selection by tapping 'Reset' button.

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Level is broadly classified under -

1. Personal
2. Unit level
3. Group level

Personal is applicable for both BE and BP, whereas, Unit & group level are BP only.

Products are: Violet & Life

Measure are broadly classified as -

1. $ Values

    1.1 SLP

    1.2 ALP Gross

    1.3 ALP Net

    1.4 Premium Paid

    1.5 Submission SLP

    1.6 Submission ALP

    1.7 Outstanding proposals SLP

    1.8 Outstanding proposals ALP

2. Count Values

    2.1 Case Gross

    2.2 Case Net

    3.3 Outstanding Proposal - Case

3. % Values

    3.1 Current year Persistency

    3.2 13t^{h} Month Persistency

    3.3 25th Month Persistency

Only one measure can be selected at once. If changed then previously selected measure will disappear and 'select' will replace existing text.

Period - Daily, month-to-date, year-to-date.

Report type - Current year, Previous year, Current Vs Previous Year.

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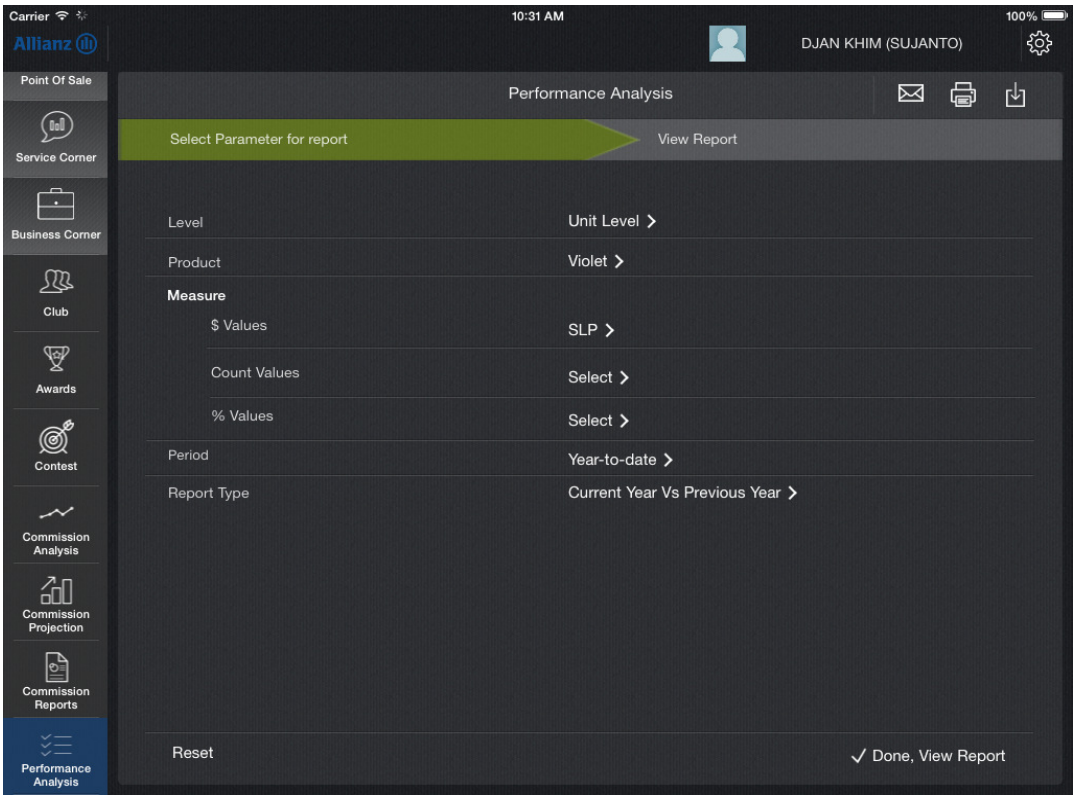

Figure 7. Parameters selected screen

Performance cannot be calculated for %values on daily basis.

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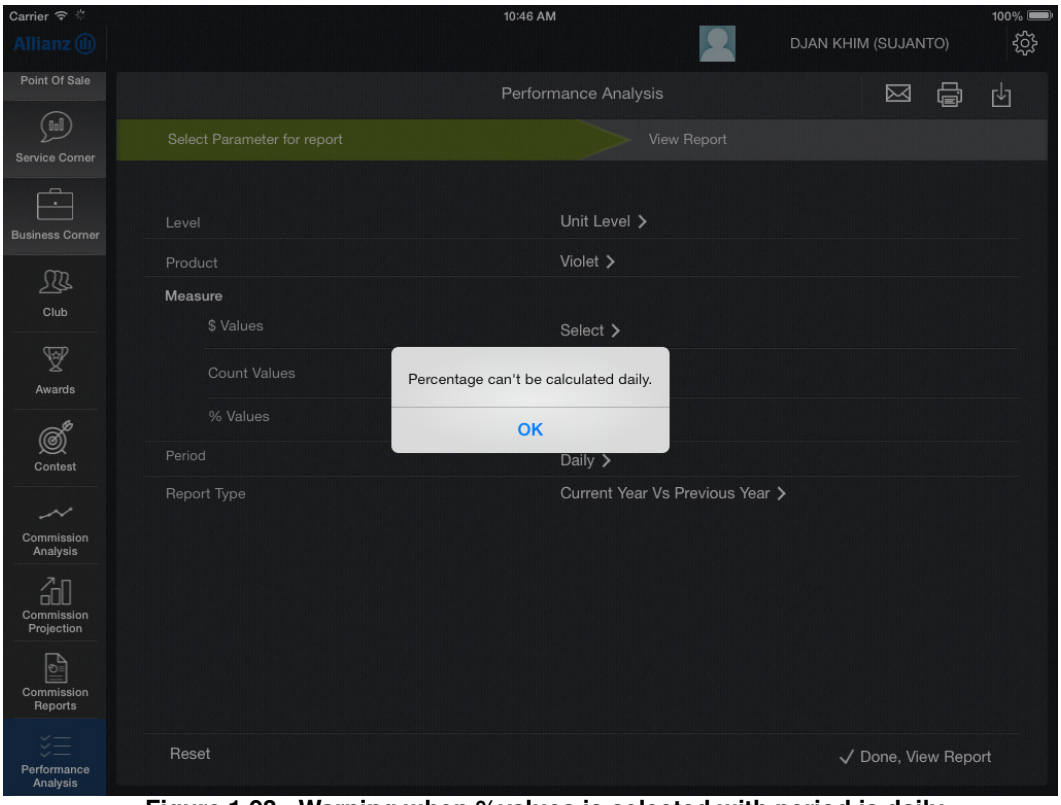

Figure 1.93. Warning when %values is selected with period is daily.

Reset button at the bottom of screen, escapes all the selection made on parameters.

Done, View Report button leads user to the Personal Level Summary Screen.

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7.7.2 Report Generated for personal

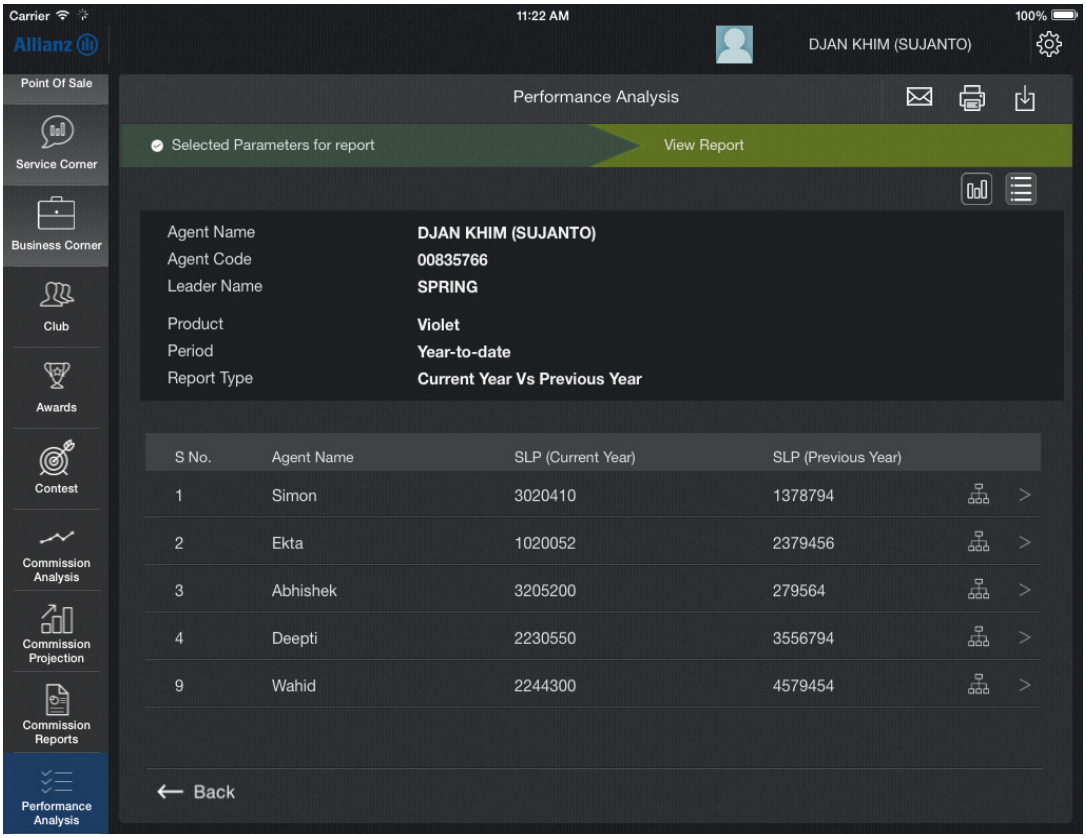

Figure 1.94. Hierarchy level - 1 summary screen in tabular form.

By default the hierarchy level one summary appears in tabular form but can also be change in graphical form.

Hierarchy image indicates that the user is BP and can be drilled down to his hierarchy. Records without image show a BE's personal and on tapping '>', it will show details of commission earned.

A maximum of eleven subordinates can be accommodated in scrollable table.

This illustration can also be obtained in chart form, screenshot attached below. This graphical representation is scrollable to all sub-ordinates.

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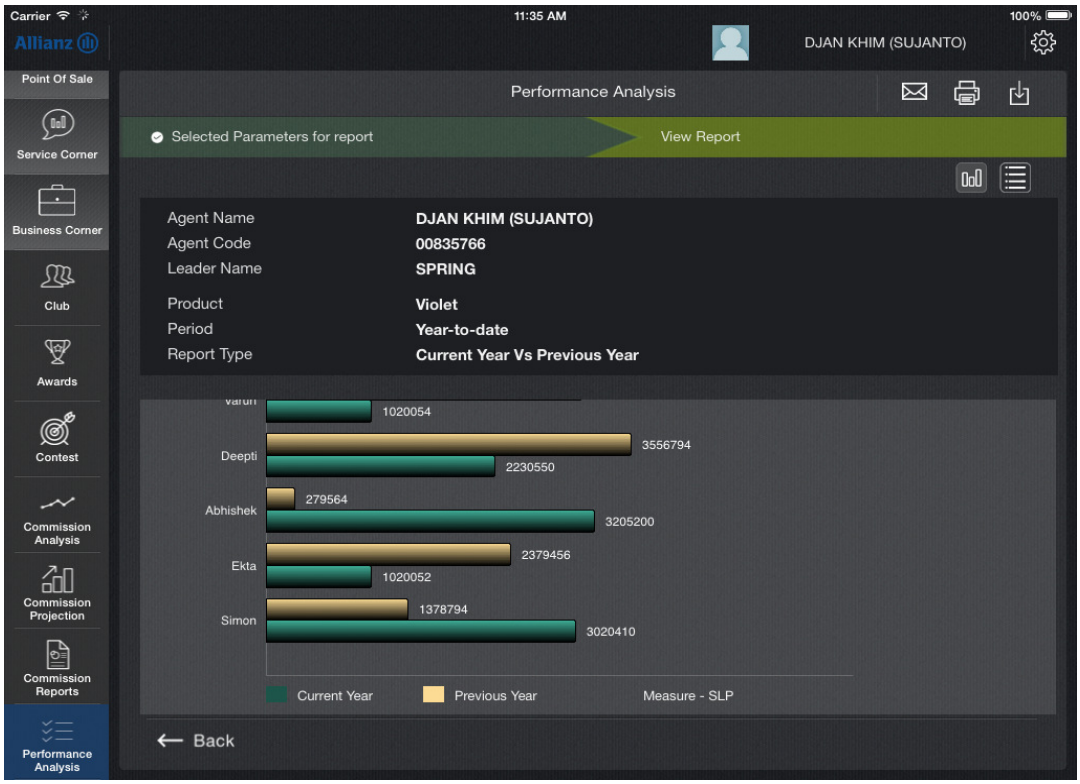

Figure 1.95. Hierarchy level - 1 summary screen in chart form.

7.7.3 Report Generated for hierarchy

After drilling into next level the screen would appear as depicted below. This drill down is possible until five generations including level one. On tapping Back button previous hierarchy is shown.

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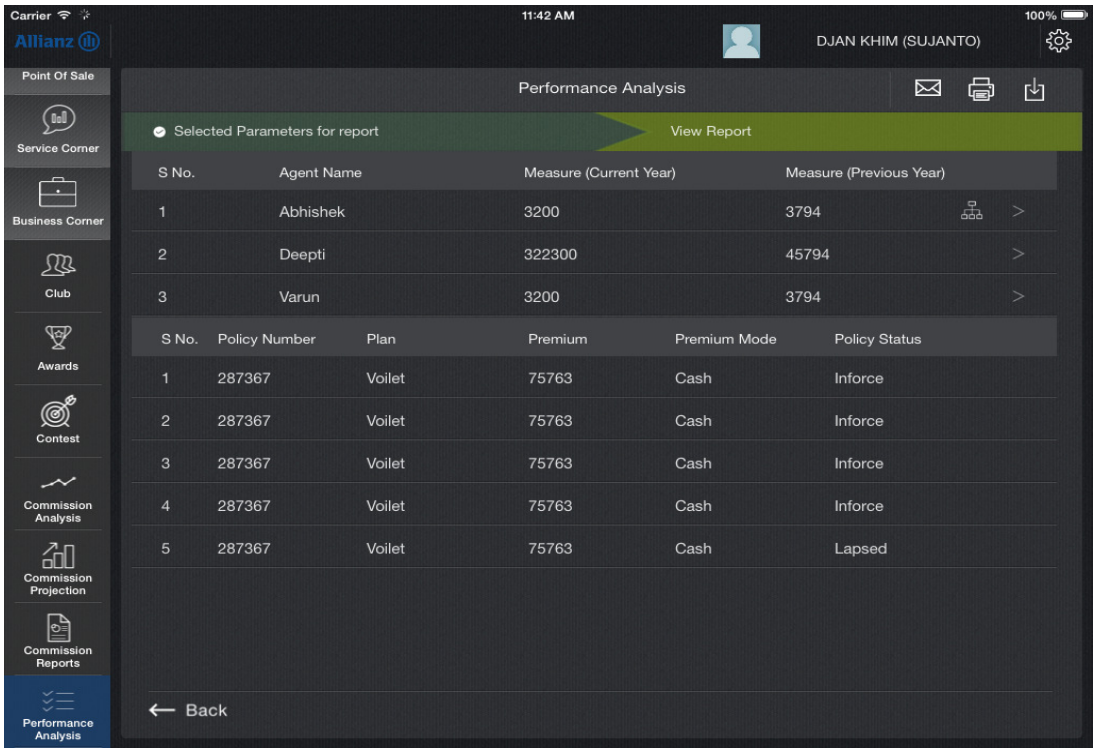

Figure 1.96. Hierarchy level - 2 onwards.

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